MICROSOFT OFFICE
SHAREPOINT 2007
POWER USER
READ ME FIRST

In case you’re not familiar with the terminology, Read Me First is quite often the name given to a computer file that contains important information for people to know prior to using an application. This section contains some important information to help you use this book so we thought we’d start with a Read Me First section.

The objectives of this guide...

- recognise the SharePoint elements.
- view, add, edit and delete items from different types of lists
- change the settings of lists within SharePoint
- create a survey for users to complete
- work with links to gain access to other resources
- work with the events list to schedule meetings and events for the team
- work with the task list to create and monitor team tasks
- amend tracking list settings
- open and respond to a survey
- display documents in a library using different views
- create and upload documents to a document library
- edit, review and monitor document changes
- create different types of libraries within SharePoint
- create and manage a document library
- add workflow to a document and track the workflow progress
- create and edit pages within a wiki library
- use a picture library and add images to it
- work with slides within a slide library
- Use Word 2007 in conjunction with SharePoint
- use Excel tools to work with SharePoint lists
- use Outlook 2007 to access elements of a SharePoint Site
- create basic web pages that contain static content within the SharePoint Site
- create a web part pages and add SharePoint elements to the web part
- organise security on a SharePoint site by using groups and permissions

What you get in a Chapter...
Each of the chapters is comprised of a summary page listing the topics covered in that chapter. The chapter then consists of single-page topic sheets pertaining to the theme of the chapter.

As you work through this guide...
It is strongly recommended that you close all open files, if any, prior to commencing each new chapter in this learning guide. Each chapter, where relevant, has its own set of course files and any from a previous chapter are no longer required.

Where to from here...
Have a look at the next page which explains how a topic page works, ensure that you have access to the exercise files (see above), and you’re ready to make a start.
WORKING WITH TOPIC SHEETS

The majority of this book comprises single-page topic sheets. There are two types of topic sheets: task and reference. The layout of both is similar – an overview at the top, detail in the centre and additional reference (optional) material at the bottom. Task sheets contain a Try This Yourself step-by-step exercise panel in the detail area as shown below.

<table>
<thead>
<tr>
<th>1</th>
<th>Topic name</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>General topic overview provides an introduction to the topic</td>
</tr>
<tr>
<td>3</td>
<td>Try This Yourself (Task-based topic sheets) is a detailed step-by-step practice exercise for you to work through. In Reference topic sheets this is usually replaced by a box with reference information.</td>
</tr>
<tr>
<td>4</td>
<td>In Task topic sheets screen shots and graphics provide a visual clue as to what will happen when you work through the Try This Yourself practice exercise. In Reference topic sheets the screen shots and graphics are used to visually represent information and concepts.</td>
</tr>
<tr>
<td>5</td>
<td>The For Your Reference (optional) element provides a quick summary of the steps required to perform a task. These usually only appear in Task-based topic sheets.</td>
</tr>
<tr>
<td>6</td>
<td>The Handy To Know (optional) element provides additional information such as alternate ways of accomplishing a task or further information providing handy tips.</td>
</tr>
</tbody>
</table>

**OPENING A DOCUMENT**

Although there are a number of different ways to open a document, the most common method is using the File menu or double-clicking on an icon of the file. Perhaps the easiest and simplest way to do this from within the Word program itself is using the ribbon’s Open command. The ribbon is a toolbar that helps you to identify file types and location.

**Try This Yourself:**

Before you begin ensure that Microsoft Word is started.

1. Select File > Open to display the Open dialog box.
2. Click on the drop-down arrow for Task or to display a list of recently opened files. Click on the file you wish to open, then click on Open or Press Enter to open the document on the screen.

**For Your Reference:**

To open a document in Word:

1. Select File > Open to display the Open dialog box.
2. Locate the file and folder (if necessary).
3. Click on [Open] or [Open].

**Handy To Know:**

There is more than one way to open a document in Word. Alternatively you could:

- Click on the Open icon
- Select a recently opened file from the File menu.
Microsoft Office SharePoint 2007 - Power User

CONTENTS

Chapter 1: An Overview of SharePoint

What is SharePoint? ................................................................. 2
SharePoint Sites .................................................................. 3
Team Sites ........................................................................... 4
Library Types ...................................................................... 5
Permissions and Groups ..................................................... 6
Accessing SharePoint .......................................................... 7
The SharePoint Window ......................................................... 8

Chapter 2: Communications Lists

View Announcements ........................................................... 10
Add an Announcement ........................................................ 11
Edit an Announcement ....................................................... 12
Delete an Announcement ................................................... 13
View Contacts List .............................................................. 14
Add a Contact .................................................................... 15
Edit a Contact .................................................................... 16
Delete a Contact ................................................................. 17
View a Discussion Thread .................................................. 18
Add a New Discussion ....................................................... 19
Reply to a Discussion ........................................................ 20
Setting Alerts ..................................................................... 21
Subscribe to a List .............................................................. 22
Sorting and Filtering Lists .................................................. 23

Chapter 3: Managing Communication Lists

General Settings for a List ....................................................... 26
Permissions & Management Settings .................................. 27
Communications Settings .................................................... 28
Create Custom Column in a List .......................................... 29
Create a View for a List ....................................................... 30
Create a Communications List ............................................ 31

Chapter 4: Creating Surveys

Create a Survey ................................................................. 34
Survey Text Questions ....................................................... 35
Survey Choice Question .................................................... 36
Survey Rating Scale Question ............................................. 37
Survey Number or Currency Questions ............................. 38
Survey Lookup Questions .................................................. 39
Survey Yes/No Questions ................................................... 40
Modify Survey Settings ...................................................... 41

Chapter 5: Links

Using Links ........................................................................ 44
Add a New Link ................................................................. 45

Chapter 6: Events

Add an Event ................................................................. 48
Edit an Event ................................................................. 49
Delete an Event ................................................................. 50
Viewing Events in a Calendar ............................................. 51
Other Events List Views .................................................... 52
**Chapter 7: Task Lists** 53
- Add a New Task ................................................................. 54
- Manage Tasks ................................................................. 55
- Filtering Tasks ................................................................. 56
- Delete a Task ................................................................. 57
- Task List Views ............................................................... 58

**Chapter 8: Managing Tracking Lists** 59
- General Settings for a List ............................................... 60
- Permissions & Management Settings .............................. 61
- Communications Settings .............................................. 62
- Create Custom Column in a List ...................................... 63
- Create a View for a List .................................................. 64
- Create a Tracking List .................................................... 65
- Add List Content to a Page .............................................. 66

**Chapter 9: Surveys** 67
- To Respond to a Survey .................................................. 68
- Survey Question Types .................................................. 69
- Viewing Survey Responses ............................................. 70

**Chapter 10: View Documents in a Library** 71
- Document Library Standard View .................................. 72
- Document Library Datasheet View ................................. 73
- Using Windows Explorer ............................................... 74
- Sorting in a Document Library ....................................... 75
- Filtering in a Document Library ..................................... 76
- Custom Filters ............................................................. 77
- Open a Document ......................................................... 78
- Document Alerts ........................................................... 79
- Manage Alerts .............................................................. 80
- Alert Notifications ......................................................... 81

**Chapter 11: Add Documents** 83
- The Shared Document Library ......................................... 84
- Create a New Document ................................................ 85
- Close a Document ........................................................ 86
- Upload a Single Document ............................................ 87
- Upload Multiple Files ................................................... 88

**Chapter 12: Edit Documents** 89
- Edit a Document in Standard View .................................. 90
- Edit a Document in Datasheet View ............................... 91
- Check In and Check Out Process ................................. 92
- Check Out a Document ................................................ 93
- Check In a Document ................................................... 94
- Delete a Document ....................................................... 95
- Document Versions ...................................................... 96
- View Document Versions ............................................. 97
- Delete Document Versions .......................................... 98
- Restore Document Versions ........................................ 99
- Restore Deleted Items .................................................. 100
# CONTENTS

## Chapter 13: Creating Libraries 101
- Create a Wiki Page Library ................................................................. 102
- Create a Picture Library ................................................................. 103
- Create a Slide Library ................................................................. 104
- Change Library Settings .................................................................. 105
- About Library Columns ................................................................... 106
- Add a Site Column to a Library ...................................................... 107
- Create a New Column ..................................................................... 108
- Library Views .................................................................................. 109

## Chapter 14: Maintain a Document Library 111
- Create a Document Library ............................................................. 112
- Document Templates ...................................................................... 113
- Change the Library Document Template ......................................... 114
- Override Check Out ....................................................................... 115
- Create a Document Library View .................................................... 116

## Chapter 15: Document Workflow 117
- What is Workflow? .......................................................................... 118
- Document Library Workflow Settings ............................................. 119
- Document Library Workflow Progress ............................................ 120
- Using Document Workflow ............................................................ 121

## Chapter 16: Wiki Library 123
- Edit a Wiki Page ............................................................................. 124
- Create Links to a Page ..................................................................... 125
- Create a New Wiki Page ................................................................. 126
- Wiki Page Maintenance .................................................................. 127

## Chapter 17: Picture Library 129
- Upload a Picture to a Library .......................................................... 130
- Upload Multiple Pictures to a Library ............................................. 131
- Viewing Pictures in a Library ......................................................... 132
- Edit a Picture in a Library ............................................................... 133
- Delete a Picture from a Library ....................................................... 134
- Downloading and Sending Pictures ................................................ 135

## Chapter 18: Slide Library 137
- Publish Slides from PowerPoint Presentations ............................. 138
- Delete Slides from a Slide Library .................................................. 139
- Use a Slide in a Presentation ......................................................... 140
- Edit a Slide ..................................................................................... 141

## Chapter 19: Working with Word 2007 143
- Open a SharePoint Document from Word 2007 ........................... 144
- Save a Document to a Document Library ..................................... 145
- Document Workspace .................................................................... 146
- Create a Document Workspace in Word 2007 ............................... 147
- Document Management Panel ...................................................... 148
## CONTENTS

**Chapter 20: Working with Excel 2007**

- Export a List to Excel 2007 ................................................................. 150
- Table Tools in Excel 2007 .................................................................. 151
- Linking Lists ....................................................................................... 152

**Chapter 21: Working with Outlook 2007**

- Adding SharePoint Contacts to Outlook ............................................ 154
- Add A SharePoint Calendar to Outlook 2007 ..................................... 155
- Add A SharePoint Task List to Outlook 2007 .................................... 156
- Working with Alerts ........................................................................... 157

**Chapter 22: Basic Web Pages**

- Create a Web Page Library ................................................................. 160
- Create a Basic Web Page ................................................................. 161
- Edit a Basic Web Page ...................................................................... 162
- Add an Image to a Basic Web Page .................................................. 163
- Create Hyperlinks on a Basic Web Page .......................................... 164
- Create a Link to a Basic Web Page .................................................... 165

**Chapter 23: Web Part Pages**

- Create a Web Part Page ..................................................................... 168
- Modify the Page Title Bar ................................................................. 169
- Add a Web Part to a Page ................................................................. 170
- Content Editor Web Parts ................................................................. 171
- Modifying Web Parts ....................................................................... 172

**Chapter 24: Users, Groups and Permissions**

- About Users, Groups and Permissions .............................................. 174
- Add a User .......................................................................................... 175
- Remove a User .................................................................................. 176
- Create a New User Group ................................................................. 177
- View Group Permissions .................................................................... 178
- Change Group Settings ....................................................................... 179
- Add a User with Individual Permissions ............................................ 180
SharePoint is a Microsoft product which allows users to collaborate in a web based environment and uses a web browser, such as Internet Explorer, to access the information.

Basically, it works like a web site and users can view, add and edit the details on the pages.

In this section you will gain an overview of the SharePoint elements and their purposes.

In this session you will:

- gain an overview of SharePoint
- gain an overview of the various site types available within SharePoint
- gain an overview of the elements within a SharePoint Team Site
- gain an overview of the various libraries available within SharePoint
- gain an overview about the default permissions and groups provided by SharePoint
- learn how to log in and log out of the SharePoint site safely
- gain an overview of the window elements in SharePoint.
WHAT IS SHAREPOINT?

SharePoint has been around for quite a while and is becoming more and more popular. It allows users to collaborate regardless of their geographical position. Members can communicate, share ideas and information, and keep up to date with current events. All they need is a computer, an internet connection and a web browser application.

How does it work?

When you first take a look at SharePoint you will notice that it looks like any other ordinary website. Depending on how the site set up, you may require a user name and password to enter the site.

The site is built by creating web pages which can store different types of information and the best thing about these pages is that they are interactive.

The structure and size of the site is extremely flexible and will vary between organisations. Many SharePoint sites use Team Sites in order to keep relevant information for a team in one central location and you will usually find that there are many team sites that make up the entire site.

There is also a personal area for each user called My Site which can be used to store private documents and information.

Example SharePoint Site Structure

Let's say that the Sales Team in London need to send information about a product to a client. The Sales Team in Glasgow also need to send the same product information to a different client. As the product information is stored in a picture library in the Sales Team site, both clients will receive exactly the same information.

Why use SharePoint?

Every item within the SharePoint site is easily accessible from any location by using the internet. As many people are comfortable “surfing” the web, it is a lot easier than navigating through a complex folder structure on a shared network server in order to find the required information.
SHAREPOINT SITES

SharePoint is basically a web site with sub-sites and there are many different types of sub site which can be created under the main site. These sites are broken down into four categories, Collaboration, Meetings, Enterprise and Publishing. Each type of site has a template which includes predefined elements such as lists and libraries so that they don't have to be created from scratch.

Collaboration Sites
Collaboration sites are designed to help teams organise and share information. Some of the sites include predefined lists and libraries which can store various types of files and data. The Wiki and Blog sites can be used to share thoughts and ideas which other users can comment on and become involved. The Collaboration site types are:-

- Team Site
- Blank Site
- Document Workspace
- Wiki Site
- Blog

Meeting Sites
Meeting Sites are designed to plan, organise and record the outcome of meetings. These sites can also store items such as documents, agendas and tasks. They can also be used to track the progress of meeting tasks and the meeting objective. The Meeting site types are:-

- Basic Meeting Workspace
- Blank Meeting Workspace
- Decision Meeting Workspace
- Social Meeting Workspace
- Multipage Meeting Workspace

Enterprise Sites
Enterprise Sites are designed to record information and include a Document Center which can contain multiple document libraries. There are other centers such as the Records Centre which could be used to store purchase order information. There is also a Search Center which can be customised to contain more search facilities than the simple search that is provided on the Home Page. The Enterprise site types are:-

- Document Center
- Records Center
- Personalization Site
- Site Directory
- Report Center
- Search Center with Tabs
- Search Center

Publishing Sites
Publishing Sites can be used to create web pages that can literally contain any other type of information including a News site which stores articles and links. The Meeting site types are:-

- Publishing Site
- Publishing Site with Workflow
- News Site
TEAM SITES

One of the more popular sites created within SharePoint is the Team Site where users can share information and collaborate ideas and thoughts. There are many elements which are automatically created within a Team Site but there is also scope to create further items depending on the teams needs.

Libraries

Libraries within a Team Site are used to store various types of files and data. For example, a document library can store files such as Word documents or Excel spreadsheets. You can also create new files within a document library using a SharePoint compatible program such as Microsoft Office.

You can store other types of files in a document library but in order to edit them you must have the authoring software installed on your PC.

Lists

There are three types of lists that can be created within a SharePoint Team Site, Communication, Tracking and Custom lists.

Communications lists can contain:-

- **Announcements** which are used to keep the team informed of important changes or news.
- **Contacts** which store the names, addresses, and telephone numbers of useful contacts for the whole team.
- **Discussion boards** which allow users to start an electronic conversation that everyone else can watch and respond to.

Tracking lists can contain:-

- **Links** which provide hyperlinks to other useful web pages.
- **Calendars** which are used to store events, meetings and appointments that can involve the whole team.
- **Tasks** which is a list of “to do” items that involve users within the team.
- **Surveys** which work like questionnaires that can be used to gain feedback and opinions.

Custom Lists can contain:-

- Customised columns of information which can then be used to add items.
- Custom list in Datasheet View works just like the custom list but the information is displayed and analysed in a spreadsheet format
- Languages and Translators list allow you to store workflow for translation tasks and assign translators to each task
- KPI lists are used to track a set of goals and used coloured indicators to specify achievement
- Import Spreadsheet will bring existing data from a spreadsheet into SharePoint

Web Pages

Not all areas of a SharePoint Team Site comprises of lists. You may want to include a page that has static information or captures information from other areas of SharePoint. Web Pages allow you to create different types of pages which can show this information.
# Library Types

SharePoint libraries are designed to store various file types. Each library has a unique template so that you can create new documents from within the SharePoint site. You can also upload existing documents into SharePoint libraries from your local computer or your shared network area. Files can also be downloaded to your computer from the SharePoint site.

<table>
<thead>
<tr>
<th>Library Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Document Library</td>
<td>Create a document library when you have a collection of documents or other files that you want to share. Document libraries support features such as folders, versioning, and check out.</td>
</tr>
<tr>
<td>Form Library</td>
<td>Create a form library when you have XML-based business forms, such as status reports or purchase orders, that you want to manage. These libraries require a Windows SharePoint Services-compatible XML editor, such as Microsoft Office InfoPath.</td>
</tr>
<tr>
<td>Wiki Page Library</td>
<td>Create a Wiki page library when you want to have an interconnected collection of Wiki pages. Wiki page libraries support pictures, tables, hyperlinks, and wiki linking.</td>
</tr>
<tr>
<td>Picture Library</td>
<td>Create a picture library when you have pictures you want to share. Picture libraries provide special features for managing and displaying pictures, such as thumbnails, download options, and a slide show.</td>
</tr>
<tr>
<td>Data Connection Library</td>
<td>Create a Data Connection Library to make it easy to share files that contain information about external data connections.</td>
</tr>
<tr>
<td>Translation Management Library</td>
<td>Create a translation management library when you want to create documents in multiple languages and manage translation tasks. Translation management libraries include a workflow to manage the translation process and provide sub-folders, file versioning, and check-in/check-out.</td>
</tr>
<tr>
<td>Report Library</td>
<td>Create a report library to simplify the creation, management and delivery of web pages, documents and key performance indicators that communicate metrics, goals and business intelligence information.</td>
</tr>
<tr>
<td>Slide Library</td>
<td>Create a slide library when you want to share slides from Microsoft Office PowerPoint, or a compatible application. Slide libraries also provide special features for finding, managing, and reusing slides.</td>
</tr>
</tbody>
</table>
PERMISSIONS AND GROUPS

The administrator of the SharePoint site will need to grant access to the users. Individual users can be assigned their own permissions or they can belong to a group where the permissions are already allocated. The permissions range from read only where users can only view the information, to full controls where users can add more sites, and create pages, lists and libraries.

Permissions

There are five permission levels which are provided by SharePoint by default, but you can create further levels if required.

<table>
<thead>
<tr>
<th>Permission Level</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Full Control</td>
<td>This level allows users to basically do anything to the site. They have full control over the site settings, pages, lists, libraries and any other elements that may need to be created in the Site. This level is usually assigned to the <strong>Owners</strong> group.</td>
</tr>
<tr>
<td>Design</td>
<td>This level will allow users to create lists and libraries and edit pages and is not assigned to a group by default.</td>
</tr>
<tr>
<td>Contribute</td>
<td>This level will allow users to add, edit and delete items within lists and libraries but they will not be able to change the settings of the actual list or library. This level is usually allocated to the <strong>Site Members</strong> group.</td>
</tr>
<tr>
<td>Read</td>
<td>This level will only allow users to read the information, they will not be able to add, edit or delete items and this level is usually assigned to the <strong>Site Visitors</strong> group.</td>
</tr>
<tr>
<td>Limited Access</td>
<td>This level will allow users access to specific items within lists or libraries but not the entire site, list or library.</td>
</tr>
</tbody>
</table>

Groups

SharePoint provides three default groups with assigned permission levels. It is possible to create your own custom groups and permissions if required.

<table>
<thead>
<tr>
<th>Group Name</th>
<th>Permission Level</th>
</tr>
</thead>
<tbody>
<tr>
<td>Site Name <strong>Owners</strong></td>
<td>Full Control</td>
</tr>
<tr>
<td>Site Name <strong>Members</strong></td>
<td>Contribute</td>
</tr>
<tr>
<td>Site Name <strong>Visitors</strong></td>
<td>Read</td>
</tr>
</tbody>
</table>

If you have many users within the team that required the same permissions, you should consider creating a new group and adding the users to the group. This means that if you change the group permissions, everyone within the group will be affected.

If you have a user who requires specialist permissions, you can assign individual permissions for that particular user which are added to the permissions they hold as a group member.
**ACCESSING SHAREPOINT**

The whole purpose of using SharePoint is so that resources and information are easily accessible from anywhere in the world. You may find that if you are accessing the site from outside the organisation buildings, maybe from home, you may need to enter security information such as a username and password. Likewise when you have finished working in the site, you will need to log out.

---

**Log In**

When you are accessing SharePoint from a computer that is not within the organisation network you will probably be required to enter a username and password. The Log in screen will look different between organisations, but this is an example of what you might see:-

![Log In Screen Example](image)

1. Enter your **username** and **password** and then click **Log On** to enter the SharePoint Site

---

**Log Out**

When you have finished working in the SharePoint Site it is good practice to sign out rather than just closing the browser window.

1. From the **Welcome Bar** at the top of the page, click the drop down arrow next to your user name
2. Click **Sign Out**
THE SHAREPOINT WINDOW

SharePoint has a number of themes and designs which can be applied to the site, but the main elements are generally the same regardless of the applied design.

SharePoint Window

1. The **Global Links** provides a link back to the Home Page of the site and in this example the home page is called *Training Unit*.

2. The **Navigation Bar** provides access to other areas of the Team site such as the Document Center where all the Libraries are listed. In this example the navigation bar uses a tabbed layout.

3. The **Quick Launch Bar** provides shortcuts to various SharePoint elements such as lists, libraries and news items. It is also possible to customise SharePoint elements so that you can include/exclude them from the Quick Launch Bar.

4. The **Welcome area** provides a menu for the logged in user to personalise the site and allows access to the *My Site* part of SharePoint.

5. The main area of the window displays the content of each page, list or library.
CHAPTER 2 COMMUNICATIONS LISTS

In this session you will:

- learn how to access the announcements list and display individual items in full
- learn how to add announcements to a list
- learn how to change the information in an announcement and attach extra files
- learn how to delete an announcement
- learn how to display the default SharePoint contact list
- learn how to add a contact to a list
- learn how to change the details for a contact
- learn how to delete a contact
- learn how to view discussion subjects and their replies
- learn how to add a new discussion topic in a Discussion Board
- learn how to reply to a discussion
- learn how to set alerts for items, lists, and libraries
- learn how to view RSS Feeds and subscribe to a list or library
- learn how to sort and filter items in Lists.

The lists within SharePoint have been designed to make communication quick and easy.

SharePoint lists provide a central point which people can access in order to read, edit, or add to the list items. By visiting the SharePoint site, users can keep up to date with news and information.

One of the benefits of using SharePoint lists is that it eradicates the need to send numerous email messages and therefore reduces the amount of email traffic generated.

There are different types of list, but the general use of lists is much the same, regardless which type of list you are using.
VIEW ANNOUNCEMENTS

Announcements is one of the built in lists provided by SharePoint and is generally used to post messages which appear on a home page within the site. It can be used quite effectively as an electronic noticeboard which includes important information. Announcements consist of a Title, which is what is displayed on the home page and body text which allows for more explanation.

Try This Yourself:

1. Before starting this exercise you MUST open the SharePoint Site
2. Navigate to the Team Site Home Page and open the Document Center
   Announcements are displayed in the Document Center Home page by default
3. Click Announcements from the Quick Launch Toolbar or click the Announcements title on the page to open the list.
   All the announcements posted are displayed
4. Click on the title of the announcement
   OR
   Click the Edit button to the right of the announcement title and click View Item
5. All the information about the announcement is displayed, including the body text and any expiry date(if specified)
6. Click Close to exit the announcements and return to the list

For Your Reference…

To view the full announcement:
1. Navigate to the Team Site and display the Document Center
2. Click Announcements from the Quick Launch Toolbar
3. Click the title of the announcement to open it
4. Click Close to return to the list

Handy to Know…

• You may find that when you have quite a few announcements that not all of them are automatically displayed on the Home Page of the Document Center. Depending on the settings it may be that a limit for the number of announcements has been set.
ADD AN ANNOUNCEMENT

If you have been allocated sufficient permission, you will be able to add announcements to the list. The **Title** should be short and informative whilst the body text allows you to elaborate. Announcements can be added directly to the Home page or by displaying the Announcements list in full. New announcements are displayed with the !**New** symbol so that they can be easily identified.

---

**Try This Yourself:**

1. Open File
   - Before starting this exercise you MUST open the SharePoint Site

2. Navigate to the Document Center
   - Under the Announcements list on the home page, click **Add new announcement**

3. An alternative method is to click **Announcements** to display the full list
   - From the **New** menu, click **New Item**
   - **Note:** As the only command available in the New menu is "New Item", you can click on New without clicking the menu drop down arrow.

4. Enter a **Title**, **Body text** and **Expiry date** and click [**OK**]
   - Required fields are indicated by a red asterisk, all other fields are optional.
   - The new announcement will appear in the list.

---

**For Your Reference...**

**To add an announcement:**

1. From the Document Center Home Page, click **Add new announcement**
   - In the Announcements list, click **New**

2. Enter the announcement information and click [**OK**]

---

**Handy to Know...**

- New announcements usually display the !**New** symbol for up to 48 hrs, but this can vary depending on the site settings.
- If you specify an expiry date for the announcement, it will "drop off" the home page, but still remain in the full list of announcements.
EDIT AN ANNOUNCEMENT

Announcements can be edited by changing the Title, Body text or Expiry date. You can also attach files to them which can be useful if the announcement involves in depth information. This kind of detail can be stored in extra documentation and attached to the announcement. You can also attach multiple files to the announcement.

Try This Yourself:

Open File

Before starting this exercise you MUST open the SharePoint Site

1 Display the Announcements list

2 Click the Edit button to the right of the item name and select Edit Item

OR

Click the title of the announcement to display the full item and click Edit Item

3 Change the Title, Body Text or Expiry Date (if applicable)

We also want to attach documentation to the announcement.

4 Click Attach File and then click Browse

In the Choose file dialog box, select the required file and click Open

5 Click [OK] to secure the attachment.

6 Click [OK] to accept your changes

7 The edited announcement now reflects all the changes and includes the attachment symbol.

For Your Reference...

To edit an announcement:
1. Display the Announcements list
2. Click the Edit button to the right of the announcement title and click Edit Item
3. Make the appropriate changes and click [OK]

Handy to Know...

- When editing an announcement you can also delete any attachments if they are no longer required.
DELETE AN ANNOUNCEMENT

The expiry date in an announcement controls how long the announcement will display on the home page of the site, but it still remains in the Announcements list. To ensure information is up to date and relevant, it is good practice to delete any old or unwanted announcements. Deleted announcements are sent to the Recycle Bin.

Try This Yourself:

1. Open File

Before starting this exercise you MUST open the SharePoint Site

2. Display the Announcements list

3. Click the Edit button to the right of the announcement name and click Delete Item

OR

4. Click the title of the announcement to display the full details and click Delete Item

5. When prompted to send the item to the Recycle Bin, click [OK]

For Your Reference...

To delete an announcement:

1. Click the Edit button to the right on the announcement name and click Delete Item

OR

2. Open the item by clicking the announcement title and click Delete Item

3. Click [OK] to send to Recycle Bin

Handy to Know...

- Items that are deleted do not sit in the Recycle Bin indefinitely. Depending upon how the site has been set up, the Recycle bin may be emptied as frequently as every 30 days.
VIEW CONTACTS LIST

As with most other libraries and lists within SharePoint, Contacts is another list that is provided by default when a new site is created. This list can be used to store information about people that your team work with such as your clients or suppliers. One of the benefits of using a SharePoint Contact list is that it is constantly monitored and updated by the people who use it.

Try This Yourself:

1. Display the Team Site home page
2. From the Quick Launch Toolbar, click View All Site Content
3. From the Lists section, click Contacts
4. The contacts are listed in alphabetical order by the last name

For Your Reference...

To display the contacts list:
1. Open the Team Site home page
2. From the Quick Launch Toolbar, click View All Site Content
3. From the Lists section, click Contacts

Handy to Know...

- Contact lists can be used with other SharePoint compatible programs such as Microsoft Outlook and Microsoft Access
ADD A CONTACT

SharePoint provides default fields to complete when creating new contacts. The only required field is the Last Name.

It is also possible to create fields or columns in the Contact list if there is extra information that you need to include but SharePoint fields do not accommodate.

Try This Yourself:

1. Display the Contact List
2. Click the New menu
   Hint: as the only item in the New menu is to create a New Item, you can simply click the New menu
3. Enter the details for the contact and then click [OK]

For Your Reference...

To add a contact to a list:
1. Display the Contact list
2. Click the New menu
3. Enter the details for the contact and then click [OK]

Handy to Know...

- You can also attach files to a contact so that you can store further information
EDIT A CONTACT

Contact information changes on a regular basis, i.e., people move jobs, change their phone number, get a new email address etc and it is very quick and simple to change the details.

Try This Yourself:

1. Open File
   Before starting this exercise you MUST open the SharePoint Site

2. Display the Contact list

3. Click the Edit button on the contact name and click Edit Item
   OR
   Click the Last Name for the Contact and then click Edit Item

3. Make the appropriate changes and then click [OK]

For Your Reference...
To edit a contact:
1. Display the Contact List
2. Click the Edit button for the contact
3. Click Edit Item
4. Make the changes and then click [OK]

Handy to Know...
- When entering a web address for a contact, SharePoint provides an option to test the URL to ensure you have typed it correctly.
DELETE A CONTACT

Now we are beginning to see a pattern of how items are treated within lists. Deleting a Contact is quick and easy and uses the same process as deleting an announcement.

Try This Yourself:

1. Open File
   - Before starting this exercise you MUST open the SharePoint Site
2. Display the Contacts list
3. Click the Edit button for the contact and click Delete Item
   - OR
4. Click the Contact Last Name and then click Delete Item
   - Using either method, you will be prompted to send the item to the Recycle Bin.
   - Click [OK]

For Your Reference...

To delete a contact:
1. Display the Contacts List
2. Click the Edit button for the contact and then click Delete Item
3. Click [OK] to send the item to the Recycle Bin

Handy to Know...
- If you inadvertently delete a contact you can display the Recycle Bin and restore the item back to its original location.
VIEW A DISCUSSION THREAD

Discussion boards are another method of keeping in touch with people without having to send numerous email messages or make endless phone calls, which are frequently unanswered. A discussion board is a one stop shop where all users can join in the conversation by viewing the comments made by other users and adding their own comments if appropriate.

Discussion Board

When you first enter the discussion board, the topics will be listed showing the subject, the creator, the number of replies, and the last update. By changing the view, you can see more of the information and the replies given.

1. Click the **Subject** name in order to display all the replies

2. Click **View** at the top of the page to change the current view

**Flat View**

Displays the order by date in which the item was created and responded to

**Threaded View**

Displays each reply slightly indented so that you can identify which comment was replied to

To return to the main discussion board to see all the topics, click the name of the discussion board (in this example “Team Discussion”) in the “Breadcrumb Trail” at the top of the page
ADD A NEW DISCUSSION

Any user with sufficient permission can start a new discussion within the SharePoint Team Site. Although it is worth mentioning that discussion topics should be relevant and appropriate.

Use the discussion board to share ideas, gather opinions and keep in touch with other team members that you may not see on a regular basis.

Try This Yourself:

1. Display the discussion board
   In our example, the default discussion board has been named “Team Discussion”
2. Click the New menu
   As the only command in the menu is Discussion, you can click the New menu to create a New item
3. Enter a Subject for the discussion and then enter the Body text to expand on the discussion.
4. Click [OK]

For Your Reference...
To add a new discussion:
1. Display the Discussion Board
2. Click the New menu
3. Enter a Subject and the Body of the discussion
4. Click [OK]

Handy to Know...
- When creating a new discussion, SharePoint provides tools which will allow you to enhance the appearance of the text, such as Bold, Underline and Colour formatting.
- You can also attach other files to the discussion by using the Attach file button.
REPLY TO A DISCUSSION

The whole point of a discussion is to interact with other users and is a bit like having a conversation with everyone who has access to the Team Site. Unlike a real face to face conversation, users are not expected to respond immediately, but can use the discussion to respond at a convenient time. It can be compared to everybody receiving the same email message, but without all the email traffic.

Try This Yourself:

Before starting this exercise you MUST open the SharePoint Site

There are two methods of replying to a discussion:

Display the Discussion Board

Click the Edit button and then click View Item

Click Reply

OR

Click the Subject of the Discussion

Then click the Reply button

Enter your reply and then click [OK]

For Your Reference...

To reply to a discussion:
1. Display the Discussion Board
2. Click the Edit button > View Item
3. Click Reply
4. Enter the details of the reply and then click [OK]

Handy to Know...

• When displaying the discussion board, the subject will only appear once, but the replies column will show the number of responses given
SETTING ALERTS

Alerts are a way of keeping informed of changes made to different items, lists or libraries. Alerts work in much the same way throughout the whole of SharePoint. Alerts can be set on individual items in a list or library or you can create an alert for an entire list or library. In any case, setting an alert will send you an email message telling you that something has been changed.

Why use Alerts?

By setting an alert on an item it means that you will receive an email message to tell you that a change has occurred. You can specify what changes you want to be notified of. For example, you may want to know if anything at all changes on the item or if a certain part of the item is changed. You can also specify how often you receive the alerts. If you think the item is likely to change numerous times in a day, you would not want to be notified immediately as this could generate lots of unnecessary email messages. The settings for an alert vary slightly depending on the item you are creating the alert for.

Setting Alerts for Single List or Library Items

One item is considered to be one document from a document library, one picture from a picture library or one contact from a contacts list, but the process of setting the alert is virtually the same.

1. Click the Edit button for the item you to create the Alert
2. Click Alert Me

Setting alerts for an Entire List or Library

If any of the items within the list or library are changed, then you will be notified. If this is the type of alert that you need, it is probably a good idea to set the frequency of the email message to daily or weekly so that you receive a summary.

1. Click the Actions button within the List or library you want the Alert for
2. Click Alert Me
3. Select the required alert settings
SUBSCRIBE TO A LIST

RSS Feeds are widely used throughout internet and intranet sites. RSS stands for Really Simple Syndication and it is a method of viewing certain parts of a website and the changes without having to actually find the information. When you subscribe to a SharePoint list you will be able to view the items at a quick glance using your web browser, it works in a similar manner to favourites.

Why Subscribe?

We already know that we can set alerts on lists and libraries in order to be notified of changes, but RSS subscription is a little more discreet. Rather than sending you an email message, you can use your web browser to display the RSS Feed for the list or library you subscribed to. Essentially, you gain an overview of the items in the list or library and if something is added, changed or deleted, the RSS Feed within your browser will appear bold, just like your inbox appears in bold text when you have unread messages.

If you have the facility, Outlook can also be configured for RSS Feeds.

View RSS Feeds

It really doesn’t matter which library or list you are using, viewing the RSS Feed is the same process.

1. Click the Actions menu and then click View RSS Feed
2. The Feed page is displayed in the browser
3. Click Subscribe to this feed
4. Click Subscribe

View Feeds in a Browser

1. Open your Internet Browser and display the Feeds
2. Click the feed for the SharePoint List or Library to show the information
SORTING AND FILTERING LISTS

Easy ways to find the information you want to work with include sorting and filtering the items. The method is the same in any list or library and can save time when trying to locate files, contacts, or other list items. Sorting will allow you to display all items in a specific order; whereas filtering allows you to “pick out” the items you need and temporarily hide the unwanted items.

Sorting a List

The column headings within a list are used to sort and filter the items. For example, if you wish to sort the items by their Title, use the Title column heading, if you want to see the items in date order, use the Modified column heading.

1. **Open** the required List
2. Click the **drop down arrow** on the appropriate **column** heading
3. Select **Ascending** or **Descending**

Filtering a List

Filtering allows you to choose which items you want to see, but you may find that not all columns can be filtered. This may be because the column has too many unique items such as Name or Title. Columns which include dates or user names can usually be filtered effectively.

1. **Open** the required List
2. Click the **drop down arrow** on the appropriate **column** heading
3. Select the filter **criteria**

Remove a Filter

To display all the items, click the drop down arrow on the filtered column heading and click **Clear Filter**.

---

**Date Column Example**

<table>
<thead>
<tr>
<th>Modified</th>
<th>Ascending</th>
<th>Descending</th>
<th>Clear Filter from Modified</th>
</tr>
</thead>
<tbody>
<tr>
<td>4/5/2019</td>
<td>Ascending</td>
<td>Descending</td>
<td>Clear Filter from Modified</td>
</tr>
<tr>
<td>4/29/2009</td>
<td>Ascending</td>
<td>Descending</td>
<td>Clear Filter from Modified</td>
</tr>
<tr>
<td>5/15/2009</td>
<td>Ascending</td>
<td>Descending</td>
<td>Clear Filter from Modified</td>
</tr>
</tbody>
</table>

**Approval Column Example**

<table>
<thead>
<tr>
<th>Approv</th>
<th>Ascending</th>
<th>Descending</th>
<th>Clear Filter from Approval (Empty)</th>
</tr>
</thead>
<tbody>
<tr>
<td>In Progress</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Rejected</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Column that can't be filtered**

<table>
<thead>
<tr>
<th>Type</th>
<th>Name</th>
<th>Ascending</th>
<th>Descending</th>
</tr>
</thead>
<tbody>
<tr>
<td>This column type cannot be filtered</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
SharePoint provides many default lists which are ready to use as soon as the site is set up, however, the list settings can be modified to suit the teams needs.

The settings are quite consistent throughout all the lists, but they may vary slightly depending on the type of item which is stored in the list.

List settings are separated into five main areas which are General, Permissions and Management, Communications, Columns and Views.

In this session you will:

- gain an overview of how to change the general settings for a list
- gain an overview of how to change the permissions & management settings
- gain an overview of how to change the communications settings
- gain an overview of how to create a custom column to include in a list
- gain an overview of how to create a new view for a list
GENERAL SETTINGS FOR A LIST

Changing list settings will alter how the information in the list is treated. Most lists such as Contacts, Announcements and Discussions work and behave in a similar manner so the settings are also very similar. The General settings control items such as the Title of the List, the versions allocated and how the List can be accessed.

To Display List Settings
3. Open the appropriate List
4. From the Settings menu, click List Settings

To Change a Setting
4. Click the setting you wish to amend
5. Change the options accordingly
6. Click [OK]

<table>
<thead>
<tr>
<th>General Settings</th>
<th>Title</th>
<th>Enter a new name that will appear in heading and links throughout the site</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Description</td>
<td>Enter descriptive text to help visitors</td>
</tr>
<tr>
<td></td>
<td>Navigation</td>
<td>Specify whether a link is displayed in the Quick Launch Bar</td>
</tr>
<tr>
<td></td>
<td>Content Approval</td>
<td>Specify whether new or amended items require approval before being published</td>
</tr>
<tr>
<td></td>
<td>Item Version History</td>
<td>Turn On/Off creating versions an item is edited</td>
</tr>
<tr>
<td></td>
<td>Draft Item Security</td>
<td>Specify who should be able to see items before they are approved</td>
</tr>
<tr>
<td></td>
<td>Content Types</td>
<td>When creating New items, the default type is listed in the New menu, choose to include other types</td>
</tr>
<tr>
<td></td>
<td>Item-level Permissions</td>
<td>Specify which users can Read and edit items</td>
</tr>
<tr>
<td></td>
<td>Attachments</td>
<td>Specify whether attachments are enabled for the list</td>
</tr>
<tr>
<td></td>
<td>Folders</td>
<td>Specify whether New Folders can be created within a list</td>
</tr>
<tr>
<td></td>
<td>Search</td>
<td>Specify whether the items in the list should be visible in a search</td>
</tr>
<tr>
<td></td>
<td>Enable Audience Targeting</td>
<td>This option will create a targeting column which can assist with filtering</td>
</tr>
</tbody>
</table>
PERMISSIONS & MANAGEMENT SETTINGS

You can use these settings to manage the workflow settings, delete the list if it is no longer required and check what permissions users have within this list. Whilst permissions is one of the options, it may not be something that can be altered whilst working in a single lists settings as permissions may be inherited from the parent site. It does show you which users can do what!

To Display List Settings
5. Open the appropriate List
6. From the Settings menu, click List Settings

To Change a Setting
7. Click the setting you wish to amend
8. Change the options accordingly
9. Click [OK]

<table>
<thead>
<tr>
<th>Permissions and Management</th>
<th>This option will delete the list and all it’s content and send it to the Recycle Bin</th>
</tr>
</thead>
<tbody>
<tr>
<td>Delete this list</td>
<td></td>
</tr>
<tr>
<td>Save list as template</td>
<td></td>
</tr>
<tr>
<td>Permissions for this list</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Permissions and Management</th>
<th>File Name Enter the name for the template file</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Create a name that the template will use</td>
</tr>
<tr>
<td>Description</td>
<td>Enter a description</td>
</tr>
<tr>
<td>Include Content</td>
<td>Will use the existing items in the list in the template</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Permissions and Management</th>
<th>Settings can only be changed for the list if they haven’t been inherited from the parent web site, however you can see a list of he users permission settings.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Delete this list</td>
<td></td>
</tr>
<tr>
<td>Save list as template</td>
<td></td>
</tr>
<tr>
<td>Permissions for this list</td>
<td></td>
</tr>
<tr>
<td>Workflow settings</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Permissions and Management</th>
<th>Workflow Select a workflow template such as Approval</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Enter a name by which to identify the workflow</td>
</tr>
<tr>
<td>Task List</td>
<td>Nominate a task list that will keep track of the work</td>
</tr>
<tr>
<td>History List</td>
<td>Select which list to use to view the history</td>
</tr>
<tr>
<td>Start Options</td>
<td>Control how workflow is started (manually or automatically)</td>
</tr>
</tbody>
</table>

You can specify your own Information Management Policy or use one of SharePoint’s predefined policies.
COMMUNICATIONS SETTINGS

There are only a couple of Communications settings, Incoming e-mail settings and RSS settings, but you may find that in some lists only the RSS setting is available.

To Display List Settings
1. Open the appropriate List
2. From the Settings menu, click List Settings

To Change a Setting
1. Click the setting you wish to amend
2. Change the options accordingly
3. Click [OK]

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Incoming E-Mail</td>
<td>Specify whether items can be added to the list via an email message being sent directly to the list. Create an email address for the list</td>
</tr>
<tr>
<td>E-Mail Attachments</td>
<td>Specify how to handle any attachments that are emailed along with the item</td>
</tr>
<tr>
<td>E-Mail Message</td>
<td>Specify whether to save the original file for an incoming message</td>
</tr>
<tr>
<td>E-Mail Meeting Invitations</td>
<td>Specify whether to save meeting invitations in the list</td>
</tr>
<tr>
<td>E-Mail Security</td>
<td>Specify whether anyone can send an item to the list via e-mail or only users who have permissions</td>
</tr>
<tr>
<td>List RSS</td>
<td>Allow RSS for the list</td>
</tr>
<tr>
<td>RSS Channel Information</td>
<td>Select how the information should appear on the RSS feed page</td>
</tr>
<tr>
<td>Columns</td>
<td>Select which columns of information should appear on the RSS feed page</td>
</tr>
<tr>
<td>Item Limit</td>
<td>Specify how many items should display in the RSS Feed</td>
</tr>
</tbody>
</table>
CREATE CUSTOM COLUMN IN A LIST

Existing or new lists always contain default columns of information such as Name, Modified By, Date Modified, and so on. But sometimes these columns are not specific enough for the data that you want to include with the item. With this in mind, SharePoint allows you to create custom columns of information which are unique to the list.

How to Create a Custom Column

1. From the Settings menu, click Create Column
2. Enter a Name for the column
3. Select the type of information
4. Enter Additional Column Settings (e.g. description, requires data, max characters, default value etc)
5. Click [OK]

Data Types

There are many types of information that can be stored in a column and each data type may slightly have different settings.

<table>
<thead>
<tr>
<th>Data Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Single line of text</td>
<td>Can contain alphanumeric text with a maximum of 255 characters;</td>
</tr>
<tr>
<td>Multiple lines of text</td>
<td>Can contain alphanumeric text which spreads over the number of lines specified. It can also be a Rich Text field meaning that users will be able to format the text they input.</td>
</tr>
<tr>
<td>Choice</td>
<td>Provides a list of choices from a drop down menu, checkboxes or radio buttons. You can also specify whether typed information in this field is accepted or whether it has to be a choice from the list</td>
</tr>
<tr>
<td>Number</td>
<td>You can specify a minimum and maximum value along with the number of decimal places</td>
</tr>
<tr>
<td>Currency</td>
<td>Like the Number field, you can specify a minimum and maximum but you can also choose a currency symbol to display with the number</td>
</tr>
<tr>
<td>Date and Time</td>
<td>You can use this field to display a date or a date and time</td>
</tr>
<tr>
<td>Lookup</td>
<td>The &quot;looked up&quot; information is provided by another list that exists within SharePoint and the items are displayed as a drop down list</td>
</tr>
<tr>
<td>Yes/No</td>
<td>Either specify yes or no in this column</td>
</tr>
<tr>
<td>Person or Group</td>
<td>Use this data type to be able to choose a person or a group to attach as information to the list item</td>
</tr>
<tr>
<td>Hyperlink or Picture</td>
<td>This column allows you to store hyperlinks to URL that you can click and visit whilst working in the SharePoint List</td>
</tr>
<tr>
<td>Calculated</td>
<td>Create a formula using the list fields to perform a calculation, e.g. you could calculate the difference in days between the created date and modified date</td>
</tr>
</tbody>
</table>
CREATE A VIEW FOR A LIST

It is quite easy to sort and filter information in a List, but what if you constantly select the same sort and filter options in one particular list? Rather than going through the rigmarole of continually sorting and filtering, you can create a view which contains all of sort and filter criteria. This view can be accessed quickly and easily and can also be shared as a public view for other users.

To Create a View:

1. From the Settings menu, click Create View
2. Choose a view format
3. Enter a Name for the View and select whether is should be personal or a public view
4. Select the columns of information that should appear in the view, and their position
5. Enter the Sort criteria and the Filter criteria
6. Enter further criteria if required
   - **Group By**: Choose to display items grouped, e.g. by name, user, date etc
   - **Totals**: Choose to display a calculation such as counting the number of attachments
   - **Style**: Select a built in style to enhance the appearance of the view
   - **Folders**: Specify whether items should appear in folders to make it easier to view
   - **Item Limit**: Specify the maximum number of items to display which meet the criteria
   - **Mobile**: Specify whether this view is available on a mobile device, e.g. PDA
7. Click [OK]

To Use a Custom View:

1. Click the drop down arrow on the View option at the top of the list
CREATE A COMMUNICATIONS LIST

You may find that the three built-in communications lists, announcements, contacts, and discussion board are not enough to contain all the information that you want to share. You may also find that a select group of users need to have their own communications lists as their data is not relevant to the rest of the team. This is where creating lists becomes useful.

To Create a List:

1. From the Team Site Home Page, click View All Site Content
2. At top of the page, click Create
3. From the Communications section, select the required list
4. Enter the details of the new list
5. Click Create
If you have sufficient permission with the SharePoint Site you will be able to create a survey in order to gather information.

Surveys are made up of various questions and question types. The question types are designed to prompt the user for the type of data you require, for example, you may need the user to enter a value between 1 and 10 or you may want to provide a list of answers. By specifying the correct data type, you will get more accurate responses.

Once a survey is published it can then be completed by users and you can analyse the results.

**In this session you will:**
- learn how to create a survey
- learn how to create text questions within a survey
- learn how to create a multiple choice question for a survey
- learn how to add a rating scale question to a survey
- learn how to add number or currency questions to a survey
- learn how to create a lookup question within a survey
- learn how to create a yes/no survey question
- learn how to change the survey settings.
CREATE A SURVEY

Before adding any questions you first have to create the survey by entering basic details such as a name and description. It is also worthwhile including the length of time it is expected to take for users to complete the survey so that they can allocate enough time to work through it.

To Create a Survey

1. Display the SharePoint Team Site
2. From the Quick Launch Bar, click View All Site Content
3. At the top of the page, click Create
4. Within the Tracking section, click Survey

5. Enter the details for the Survey and then click Next

6. Add the questions and then click Finish
SURVEY TEXT QUESTIONS

Text questions can be used if you need a written answer from the user. There are two types of text question, **single line** and **multiple lines** of text. There are only slight differences between the two questions which are the maximum number of characters each one can store and the format of the answers.

To add a Single Line of Text Question:
1. Enter the **Question** and then select **Single line of text**

![New Question: Feedback](image)

2. Enter the **Additional Question Settings** (if applicable) and click **Finish**

![Additional Question Settings](image)

*Tip: To continue adding questions, click **Next Question** rather than Finish*

To add a Multiple Lines of Text Question:
1. Enter the **Question** and then select **Multiple lines of text**

2. Enter the **Additional Question Settings** (if applicable) and then click **Finish**

![Additional Question Settings](image)

*If you do not want the user to leave the question unanswered, select **Yes** to require a response.*

The maximum number of characters for this type of question is 255 characters.

*If the answer to this question is generally the same answer, enter default text.*

*If you do not want the user to leave the question unanswered, select **Yes** to require a response.*

Enter the maximum number of lines you want to allow for the answer.

*If you want users to be able to format the appearance of their answers, select one of the Rich Text types.*
**SURVEY CHOICE QUESTION**

This type of question allows you to give the user a list of answers to choose from. The list can be displayed as a drop down menu, radio buttons or check boxes. If you select check boxes it means that the user will be able to select multiple items from the list. The choice question is particularly useful if you want to restrict the answers the users give.

**To Add a Choice Question to a Survey**

1. Enter the question and then select **Choice (menu to choose from)**

2. Enter the **Additional Question Settings**
   - If you do not want users to leave the question unanswered, select Yes for Require a response.
   - Type the choices that you want to appear in the list.
   - Select how the list should appear. Checkboxes can be used if multiple answers are allowed.
   - Fill-in choices will allow users to type an answer in addition to choosing one from the list.
   - Enter the Default answer that should be displayed when the user reaches the question.

3. Click **Next Question** to enter more questions or click **Finish** if this is the last question.
SURVEY RATING SCALE QUESTION

The Rating Scale question will allow you to enter a matrix of choices or a Likert scale. The rating scale is included with the question so that the user knows what is high/low.

Rather than individual questions, the Rating Scale allows you to enter one generic question with sub-questions.

To Add a Rating Scale Question to a Survey:

1. Enter the question and then select Rating Scale

   ![Rating Scale Question Example]

   The type of answer to the question is:
   - Single line of text
   - Multiple lines of text
   - Choice (menu to choose from)
   - Rating Scale (a matrix of choices or a Likert scale)

2. Enter the Additional Question Settings

   If you do not want the user to leave the question unanswered, select Yes for Require a response.

   Enter sub questions which lead on from the main question.

   Enter the number range for the rating scale
   In this example 1 is Low and 10 is High

   Select the N/A option if you want to give the users the choice of selecting N/A

3. Click Next Question to add more questions to the Survey or click Finish

Note: This is an example of how a Rating Scale questions appears in a survey

![Rating Scale Question Example]
**SURVEY NUMBER OR CURRENCY QUESTIONS**

The number and currency type questions require the users to input a numeric value. The only difference between these types of question is the number formatting. A number can be formatted as a percentage and the currency can be formatted to include a currency symbol. In both types of question you can specify a minimum and a maximum value and the number of decimal places.

**To Add a Number or Currency Question to a Survey:**

1. Enter the question and then select either Number or Currency
2. Enter the Additional Question Settings
3. Click Next Question to continue adding questions to the survey or click Finish

---

**Example Number Question**

**Example Currency Question**
SURVEY LOOKUP QUESTIONS

This type of question provides a list of answers to choose from, but the information is already stored somewhere in the SharePoint Site. For example, you may want users to specify which events they attended, rather than typing a list you can include the information from the events list.

To Add a Lookup Question to a Survey:

1. Enter the question and then select Lookup
2. Enter the Additional Question Settings
3. Click Next Question to continue adding further questions or click Finish

Example Lookup Question:

This is how the Lookup question may appear on the Survey:

As this example has allowed for multiple values, each user will be able to add all of the events that they have attended.
**SURVEY YES/NO QUESTIONS**

As the name suggests, this question type simply requires the user to choose **Yes** or **No**. The only other setting to choose is the default value.

---

**To Add a Yes/No Question to a Survey:**

1. Enter the question and then select **Yes/No (check box)**
2. Select the Default value within the **Additional Question Settings**
3. Click **Next Question** to continue adding questions to the survey or click **Finish**

**Example Yes/No Question**

![Example Yes/No Question](image-url)
MODIFY SURVEY SETTINGS

Once you have created a survey you may find that you need to include additional questions or change how users can work with the survey. You can modify the survey by accessing the settings.

To Add Survey Questions:
1. Open the appropriate survey and from the Settings menu, click Add Questions
2. Enter the question and then click Finish

Survey Settings:
You can use the survey settings to change how users interact with the survey.

<table>
<thead>
<tr>
<th>General Settings</th>
<th>Name</th>
<th>Enter a new name that will appear in heading and links throughout the site</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Description</td>
<td>Enter descriptive text to help visitors</td>
</tr>
<tr>
<td></td>
<td>Navigation</td>
<td>Specify whether a link is displayed in the Quick Launch Bar</td>
</tr>
<tr>
<td></td>
<td>Survey Options</td>
<td>Specify whether users names appear on their responses and if they can respond to the survey multiple times</td>
</tr>
<tr>
<td></td>
<td>Item-level Permissions</td>
<td>Specify which users can Read and edit items</td>
</tr>
<tr>
<td></td>
<td>Search</td>
<td>Specify whether the items in the list should be visible in a search</td>
</tr>
<tr>
<td></td>
<td>Enable Audience Targeting</td>
<td>This option will create a targeting column which can assist with filtering</td>
</tr>
</tbody>
</table>

This option will delete the survey and all the responses. If you no longer want users to respond to the survey, remove the link from the Quick Launch Bar.
In this session you will:

- learn how to use the links in the links list
- learn how to add a link to a useful resource in the links list.
**USING LINKS**

Links are simply hyperlinks which take you to another web page. The links can be created to navigate to another area within your SharePoint site, such as a document library, a calendar or a list. Links are not just restricted to SharePoint pages as you can also create a link that navigates to a website outside of your SharePoint site.

---

**Try This Yourself:**

**Open File**

Before starting this exercise you MUST open the SharePoint Team Site

1. From the *Quick Launch Bar* click *View All Site Content*

2. Within the Lists section, click *Links*

3. Click the *Name* of the Link in order to navigate to the page

---

For Your Reference…

To use a link:

1. From the *Quick Launch Bar* click *View All Site Content*

2. From the Lists section click *Links*

3. Click the *Name* of the link to display the page

---

Handy to Know…

- If the link is to a website outside of the SharePoint site, the page will open in a new window.
ADD A NEW LINK

If you find a particularly useful resource that the whole team could use, why not add a link to it. The links list is easily accessible and is just a list of hyperlinks to other pages or lists within SharePoint and hyperlinks to other websites.

Try This Yourself:

1. Open File
   Before starting this exercise you MUST open the SharePoint Team Site

2. From the Quick Launch Bar click View All Site Content

3. Within the Lists section, click Links

4. Click the New menu to create a new item

   Enter the details of the link and click [OK]

For Your Reference...

To add a new link:
1. From the Quick Launch Bar click View All Site Content
2. From the Lists section click Links
3. Click the New menu and enter the details of the link
4. Click [OK]

Handy to Know...

• If you want to create a link to a page, list or library within your SharePoint site, navigate to the page, list or library and copy the URL from the address bar in your browser. When you add a new link you can then paste the URL without having to remember it and then have to type it in.
CHAPTER 6

Events

In this session you will:

• learn how to add an event to the events list
• learn how to change the information about an event
• learn how to delete an event
• learn how to change the calendar view of the events
• gain an overview of other ways of displaying events.

The events list is another of the default lists provided by SharePoint when you create a SharePoint site.

This list works like an electronic diary for the team where you can store upcoming meetings and events that the whole team are involved in.
ADD AN EVENT

An event can be anything from a weekly team meeting to a conference or exhibition. It is basically something that happens on a scheduled date and time. By adding events to a central list it means that users do not have to create individual entries in their own electronic diaries. All the information can be stored in one central location so that everyone is aware of what is happening.

Try This Yourself:

1. **Open File**
   Before starting this exercise you MUST open the SharePoint Team Site

2. **From the Quick Launch Bar, click View All Site Content**

3. **From the Lists section, click Events**

4. **Click the New menu to create a new item**

   Enter the details of the event and then click **[OK]**

For Your Reference...

To add an event:
1. Open the Events List
2. Click the New menu
3. Enter the details of the event and then click [OK]

Handy to Know...

- If the event happens on a regular basis, you can set it as a **recurring** event. This means that you can set a pattern for how often the event occurs.
**EDIT AN EVENT**

Nothing is absolutely set in stone and it may be necessary to change certain elements of an event such as the date, time or title etc. You may also want to make the event something that happens on a regular basis so you can make the event a recurring event. Editing an event is similar to editing any other list item.

**Try This Yourself:**

1. Locate the event that needs to be changed and click on the name of the event
2. Click Edit Item
3. Enter the changes for the event and then click [OK]

In this example the event is changed to include a recurrence.

---

**For Your Reference...**

**To edit an event**
1. Locate the event that needs to be amended and click the name of the event
2. Click **Edit Item**
3. Enter the changes and then click [OK]

**Handy to Know...**
- You can create a workspace for an event which can be used to organise attendees, agendas and other documentation that may be required for the event
DELETE AN EVENT

If an event has been cancelled it is easy enough to delete it from the events list. When an event is cancelled it is not deleted permanently, it is sent to the Recycle Bin.

Try This Yourself:

1. Open File
   Before starting this exercise you MUST open the events list
2. Locate the event that needs to be cancelled
3. Click the name of the event in order to open it
4. Click Delete Item
5. When prompted to send the item to the Recycle Bin, click [OK]

For Your Reference...

To delete an event:
1. Click the name of the event to open it
2. Click Delete Item
3. Click [OK] to send the item to the Recycle Bin

Handy to Know...

- If you have created an event on the wrong day or time you do not have to delete it and recreate it, you can easily edit it.
- Items in the Recycle Bin do not stay there indefinitely. Usually the Recycle Bin is emptied on a regular basis.
VIEWING EVENTS IN A CALENDAR

The default view for an event list is a calendar view. You can use this view to change the events so that they are displayed in Daily, Weekly or Monthly mode.

The calendar view also includes a date navigator so that you can move from month to month quickly, or you can use the previous and next buttons at the top of the calendar to navigate.

Calendar Views

Open the events list and then click the required view:

- **Day View**
- **Week View**
- **Month View**
Other Events List Views

In addition to the Calendar views, it is possible to display the events as a list. This could be useful if you want to sort or filter the items. You can also choose to display **Current Events** which mean that you will only see events that are due to happen in the future and not include events that have already happened.

**Current Events**

To display a list of current event:

1. Open the appropriate events List
2. From the View drop down list, select **Current Events**

**Tip: you can use the previous option to view events that have happened in the past**

**All Events**

When you view events in a list format it means that you can sort and filter the events by clicking the drop down arrow on a column heading and selecting the appropriate option.
SharePoint task lists can be used to track items that need to be completed by the team.

The task list is a central location where team tasks can be created and monitored. You can also assign users to the tasks so that you know who is working on them.

**In this session you will:**
- learn how to add a task to a task list
- learn how to update task status and percent complete
- learn how to display certain tasks by using the filter feature
- learn how to delete tasks that are no longer required
- learn how to use the built-in task list views.
ADD A NEW TASK

A task list can almost be considered to be a To Do list and the tasks themselves are reminders of what needs to be done.

Try This Yourself:

1. Open File
   Before starting this exercise you MUST open the SharePoint Team Site
2. From the Quick Launch Bar click View All Site Content
3. From the Lists section, click Tasks
4. Click the New menu
5. Enter the details of the task and then click [OK]

For Your Reference...
To create a new task:
1. Click View All Site Content from the Quick Launch Bar
2. Click Tasks from the Lists section
3. Click New and then enter the task details
4. Click [OK]

Handy to Know...
- If there is a specific person or group of people who are performing the task, you can assign the task to them.
MANAGE TASKS

As work is completed on a task you will want to update the progress of the task. By editing the task you can enter the percentage complete and status of the task.

Try This Yourself:

1. Open File
   - Before starting this exercise you MUST open the SharePoint Team Site

2. Within the Task List click Edit on the appropriate task, then click Edit Item
   OR
   - Click the Name of the task and then click Edit Item

3. Select a Status and enter the % complete

4. Click [OK]

For Your Reference...
To enter task status and % complete:
1. Position the mouse on the task to be updated and then click Edit
2. Select a Status
3. Enter the percentage complete
4. Click [OK]

Handy to Know...
- For complex tasks there may be other documentation available. This documentation can be attached to the task by using the Attach File button
FILTERING TASKS

As the task list grows you may want to find specific tasks such as all tasks that are not yet 100% complete, or all tasks that are high priority or even tasks that are assigned to you.

Using the filter option will allow you to display the tasks that you need to work with and temporarily hide the tasks you don’t need to see.

Try This Yourself:

1. Open File
   Before starting this exercise you MUST open the SharePoint Team Site
2. Open the appropriate Task List
3. Point to the column heading that you wish to filter by and a drop down arrow will appear to the right side
4. Click the drop down arrow and then select the criteria.

The files that are not required are temporarily hidden.

4. In this example the high priority tasks have been filtered out.

For Your Reference…

To filter tasks:
1. Click the drop down arrow on the column heading that you want to use for the filter
2. Select the criteria

Handy to Know…

- You can filter multiple columns at the same time, e.g. you may want to filter all those high priority tasks which have not yet been started
DELETE A TASK

Once a Task has been completed it can then be deleted if a record of it is no longer required. Just like other SharePoint items that are deleted, Tasks are sent to the SharePoint Recycle bin.

Try This Yourself:

Open File

Before starting this exercise you MUST open the SharePoint Team Site

From the Quick Launch Bar click View All Site Content

Within the Lists section, click Tasks

Click the Task Name to display the full task and then click Delete Item

When prompted to send the item to the Recycle bin, click [OK]

For Your Reference...

To delete a task:
1. From the Quick Launch Bar click View All Site Content
2. Click Tasks in the Lists section
3. Click the Task Name to be deleted
4. Click Delete Item and then [OK]

Handy to Know...

- If a task is deleted by mistake it can be easily retrieved from the Recycle Bin. Simply open the Recycle Bin, select the item and click Restore Selection. The task will then be placed back in its original location.
**TASK LIST VIEWS**

SharePoint provides various views in order to sort and filter particular tasks. It is possible to create new views for the way tasks are displayed, but the built-in views are rather handy.

If the task views don’t show you the information you need you can always use the sorting and filtering tools and create your own temporary view.

---

**To use a Task List View:**

1. Open the appropriate Task List
2. Select the required view from the top of the page

**Task Views**

The Task Views are quite self-explanatory, but this is exactly what you will see when you use one of the list views:

<table>
<thead>
<tr>
<th>View</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>All Tasks</strong></td>
<td>Displays very single task in the list and is also the default view for a Task List</td>
</tr>
<tr>
<td><strong>Active Tasks</strong></td>
<td>Displays all tasks where the status is not completed.</td>
</tr>
<tr>
<td></td>
<td><em>Note: The task is not complete until the status is changed to completed. Even if the % Complete is marked at 100%, you will still have to change the status to match.</em></td>
</tr>
<tr>
<td><strong>By Assigned To</strong></td>
<td>Displays all the tasks but sorts them in order by who the tasks have been assigned to. The first items in the list will be those tasks that have not been assigned to anyone.</td>
</tr>
<tr>
<td><strong>Due Today</strong></td>
<td>Displays all tasks which have a due date of today.</td>
</tr>
<tr>
<td><strong>My Tasks</strong></td>
<td>This view displays a list of tasks which have been assigned to the user who is currently logged in. This view also includes tasks where there may be multiple users assigned to the task, but your name is one of them</td>
</tr>
</tbody>
</table>

**Example Task Views**

<table>
<thead>
<tr>
<th>Active Tasks</th>
<th>By Assigned To</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Tasks</strong></td>
<td><strong>Tasks</strong></td>
</tr>
<tr>
<td>Create a task list when you want to track a group of work items that you or your team need to complete.</td>
<td>Create a task list when you want to track a group of work items that you or your team need to complete.</td>
</tr>
<tr>
<td>Title</td>
<td>Assigned To</td>
</tr>
<tr>
<td>Filing</td>
<td>Tutor 2</td>
</tr>
<tr>
<td>Prepare Rota</td>
<td>tutor 3</td>
</tr>
<tr>
<td>Print Documentation</td>
<td>tutor3</td>
</tr>
<tr>
<td>Write Handout</td>
<td>tutor 3</td>
</tr>
<tr>
<td>Chase Invoices</td>
<td>Training Unit Members</td>
</tr>
<tr>
<td>Team Brief</td>
<td>new</td>
</tr>
<tr>
<td><strong>Tasks</strong></td>
<td><strong>Tasks</strong></td>
</tr>
<tr>
<td>Create a task list when you want to track a group of work items that you or your team need to complete.</td>
<td>Create a task list when you want to track a group of work items that you or your team need to complete.</td>
</tr>
<tr>
<td>Title</td>
<td>Assigned To</td>
</tr>
<tr>
<td>Team Brief</td>
<td>new</td>
</tr>
<tr>
<td>Prepare Documentation</td>
<td>DS\tutors</td>
</tr>
<tr>
<td>Chase Invoices</td>
<td>Training Unit Members</td>
</tr>
<tr>
<td>Test Software</td>
<td>Tutor 2</td>
</tr>
<tr>
<td>Filing</td>
<td>Tutor 2</td>
</tr>
<tr>
<td>Prepare Rota</td>
<td>tutor 3</td>
</tr>
<tr>
<td>Print Documentation</td>
<td>tutor 3</td>
</tr>
<tr>
<td>Write Handout</td>
<td>tutor 3</td>
</tr>
</tbody>
</table>
The links, events and task lists contain default settings such as the columns displayed and the sort order.

Each list can be modified to include and display the information required by amending the existing views, creating new views and changing the list settings.

You can even add list content to other pages within the SharePoint Site.

In this session you will:
- learn how to change the general settings for a list
- learn how to change the permissions & management settings
- learn how to change the communications settings
- learn how to create a custom column to include in a list
- learn how to create a custom view for a list
- learn how to create a new tracking list
- learn how to add list content to a page by using web parts.
**GENERAL SETTINGS FOR A LIST**

Changing list settings will alter how the information in the list is treated. Most lists such as links, events and tasks work and behave in a similar manner so the settings are also very similar. The General settings control items such as the Title of the list, the versions allocated and how the list can be accessed.

### To Display List Settings

3. Open the appropriate List
4. From the **Settings** menu, click **List Settings**

### To Change a Setting

4. Click the setting you wish to amend
5. Change the options accordingly
6. Click **[OK]**

<table>
<thead>
<tr>
<th>General Settings</th>
<th>Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Title, description and navigation</strong></td>
<td>Enter a new name that will appear in heading and links throughout the site</td>
<td></td>
</tr>
<tr>
<td><strong>Versioning settings</strong></td>
<td>Enter descriptive text to help visitors</td>
<td></td>
</tr>
<tr>
<td><strong>Advanced settings</strong></td>
<td>Specify whether a link is displayed in the Quick Launch Bar</td>
<td></td>
</tr>
<tr>
<td><strong>Audience targeting settings</strong></td>
<td>Specify whether new or amended items require approval before being published</td>
<td></td>
</tr>
<tr>
<td><strong>Versioning settings</strong></td>
<td>Turn On/Off creating versions an item is edited</td>
<td></td>
</tr>
<tr>
<td><strong>Advanced settings</strong></td>
<td>Specify who should be able to see items before they are approved</td>
<td></td>
</tr>
<tr>
<td><strong>Audience targeting settings</strong></td>
<td>When creating New items, the default type is listed in the New menu, choose to include other types</td>
<td></td>
</tr>
<tr>
<td><strong>Content Approval</strong></td>
<td>Specify which users can Read and edit items</td>
<td></td>
</tr>
<tr>
<td><strong>Item Version History</strong></td>
<td>Specify whether emails should be sent to users when they are assigned to a task</td>
<td></td>
</tr>
<tr>
<td><strong>Draft Item Security</strong></td>
<td>Specify whether attachments are enabled for the list</td>
<td></td>
</tr>
<tr>
<td><strong>Content Types</strong></td>
<td>Specify whether New Folders can be created within a list</td>
<td></td>
</tr>
<tr>
<td><strong>Item-level Permissions</strong></td>
<td>Specify whether the items in the list should be visible in a search</td>
<td></td>
</tr>
<tr>
<td><strong>Search</strong></td>
<td>Enable Audience Targeting</td>
<td>This option will create a targeting column which can assist with filtering</td>
</tr>
</tbody>
</table>
PERMISSIONS & MANAGEMENT SETTINGS

You can use these settings to manage the workflow settings, delete the list if it is no longer required and check what permissions users have within this list. Whilst permissions is one of the options, it may not be something that can be altered whilst working in a single lists settings as permissions may be inherited from the parent site. It does show you which users can do what!

To Display List Settings

5. Open the appropriate List
6. From the Settings menu, click List Settings

To Change a Setting

7. Click the setting you wish to amend
8. Change the options accordingly
9. Click [OK]

<table>
<thead>
<tr>
<th>Permissions and Management</th>
<th>This option will simply delete the List and all it’s content and send it to the Recycle Bin</th>
</tr>
</thead>
<tbody>
<tr>
<td>File Name</td>
<td>Enter the name for the template file</td>
</tr>
<tr>
<td>Name</td>
<td>Create a name that the template will use</td>
</tr>
<tr>
<td>Description</td>
<td>Enter a description</td>
</tr>
<tr>
<td>Include Content</td>
<td>Will use the existing items in the list in the template</td>
</tr>
</tbody>
</table>

Settings can only be changed for the List if they haven’t been inherited from the parent web site, however you can see a list of who has what permission.

<table>
<thead>
<tr>
<th>Permissions and Management</th>
<th>Workflow Select a workflow template such as Approval</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Enter a name by which to identify the workflow</td>
</tr>
<tr>
<td>Task List</td>
<td>Nominate a Task List that will keep track of the work</td>
</tr>
<tr>
<td>History List</td>
<td>Select which list to use to view the history</td>
</tr>
<tr>
<td>Start Options</td>
<td>Control how workflow is started (manually or automatically)</td>
</tr>
</tbody>
</table>

You can specify your own Information Management Policy or use one of SharePoint’s predefined policies.
COMMUNICATIONS SETTINGS

There are only a couple of Communications settings, Incoming e-mail settings and RSS settings, but you may find that in some lists only the RSS setting is available.

To Display List Settings
1. Open the appropriate list
2. From the Settings menu, click List Settings

To Change a Setting
1. Click the setting you wish to amend
2. Change the options accordingly
3. Click [OK]

<table>
<thead>
<tr>
<th>Communications</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Text</td>
<td></td>
</tr>
<tr>
<td><strong>Incoming E-Mail</strong></td>
<td>Specify whether items can be added to the list via an email message being sent directly to the list. Create an email address for the list</td>
</tr>
<tr>
<td>E-Mail Attachments</td>
<td>Specify how to handle any attachments that are emailed along with the item</td>
</tr>
<tr>
<td>E-Mail Message</td>
<td>Specify whether to save the original file for an incoming message</td>
</tr>
<tr>
<td>E-Mail Meeting Invitations</td>
<td>Specify whether to save meeting invitations in the list</td>
</tr>
<tr>
<td>E-Mail Security</td>
<td>Specify whether anyone can send an item to the list via e-mail or only users who have permissions</td>
</tr>
<tr>
<td>List RSS</td>
<td>Allow RSS for the list</td>
</tr>
<tr>
<td>RSS Channel Information</td>
<td>Select how the information should appear on the RSS feed page</td>
</tr>
<tr>
<td>Columns</td>
<td>Select which columns of information should appear on the RSS feed page</td>
</tr>
<tr>
<td>Item Limit</td>
<td>Specify how many items should display in the RSS Feed</td>
</tr>
</tbody>
</table>
CREATE CUSTOM COLUMN IN A LIST

Existing or new lists always contain default columns of information such as Title, Date, description, and so on. But sometimes these columns are not specific enough for the data that you want to include with the item. With this in mind, SharePoint allows you to create custom columns of information which are unique to the list.

How to Create a Custom Column

1. From the Settings menu, click Create Column
2. Enter a Name for the column
3. Select the type of information
4. Enter Additional Column Settings (e.g. description, requires data, max characters, default value etc)
5. Click [OK]

Data Types

There are many types of information that can be stored in a column and each data type may slightly have different settings.

<table>
<thead>
<tr>
<th>Data Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Single line of text</td>
<td>Can contain alphanumeric text with a maximum of 255 characters;</td>
</tr>
<tr>
<td>Multiple lines of text</td>
<td>Can contain alphanumeric text which spreads over the number of lines specified. It can also be a Rich Text field meaning that users will be able to format the text they input.</td>
</tr>
<tr>
<td>Choice</td>
<td>Provides a list of choices from a drop down menu, checkboxes or radio buttons. You can also specify whether typed information in this field is accepted or whether it has to be a choice from the list</td>
</tr>
<tr>
<td>Number</td>
<td>You can specify a minimum and maximum value along with the number of decimal places</td>
</tr>
<tr>
<td>Currency</td>
<td>Like the Number field, you can specify a minimum and maximum but you can also choose a currency symbol to display with the number</td>
</tr>
<tr>
<td>Date and Time</td>
<td>You can use this field to display a date or a date and time</td>
</tr>
<tr>
<td>Lookup</td>
<td>The &quot;looked up&quot; information is provided by another list that exists within SharePoint and the items are displayed as a drop down list</td>
</tr>
<tr>
<td>Yes/No</td>
<td>Either specify yes or no in this column</td>
</tr>
<tr>
<td>Person or Group</td>
<td>Use this data type to be able to choose a person or a group to attach as information to the list item</td>
</tr>
<tr>
<td>Hyperlink or Picture</td>
<td>This column allows you to store hyperlinks to URL that you can click and visit whilst working in the SharePoint List</td>
</tr>
<tr>
<td>Calculated</td>
<td>Create a formula using the list fields to perform a calculation, e.g. you could calculate the difference in days between the created date and modified date</td>
</tr>
</tbody>
</table>
CREATE A VIEW FOR A LIST

It is quite easy to sort and filter information in a list, but what if you constantly select the same sort and filter options in one particular list? Rather than going through the rigmarole of continually sorting and filtering, you can create a view which contains all of sort and filter criteria. This view can be accessed quickly and easily and can also be shared as a public view for other users.

To Create a View:

1. From the Settings menu, click Create View
2. Choose a view format
3. Enter a Name for the View and select whether it should be personal or a public view
4. Select the columns of information that should appear in the view, and their position
5. Enter the Sort criteria and the Filter criteria
6. Enter further criteria if required

**Group By** Choose to display items grouped, e.g. by name, user, date etc

**Totals** Choose to display a calculation such as counting the number of attachments

**Style** Select a built in style to enhance the appearance of the view

**Folders** Specify whether items should appear in folders to make it easier to view

**Item Limit** Specify the maximum number of items to display which meet the criteria

**Mobile** Specify whether this view is available on a mobile device, e.g. PDA

7. Click [OK]

To Use a Custom View:

1. Click the drop down arrow on the View option at the top of the list
CREATE A TRACKING LIST

You may find that the three built in tracking lists, Links, Events and Tasks are not enough to contain all the information that you want to share. You may also find that a select groups of users need to have their own tracking lists as their data is not relevant to the rest of the team. This is where creating lists becomes useful.

To Create a List:

1. From the Team Site Home Page, click View All Site Content
2. At top of the page, click Create
3. From the Tracking section, select the required list
4. Enter the details of the new list
5. Click Create
ADD LIST CONTENT TO A PAGE

Communication and tracking lists can be accessed through Viewing All Site Content but it may be useful to display some of the information on another page within the SharePoint Site.

For example, if the team is involved in a project it might be worthwhile displaying the task list on the team site home page. All users will then be able to see the tasks without navigating to the list itself.

To Add a Web Part

Web parts are used to control information on a SharePoint page. A web part is simply an area on the page that can contain information from basic static text to list information and in order to see items, it needs to be added in a Web Part.

In this example we will add the tasks list to the team site home page

1. Open the page Team Site Home Page
2. From the Site Actions menu, select Edit Page
   
   The page is then split into zones with an option to Add a Web Part to each zone
3. In the Top Zone, click Add a Web Part
4. Click Advanced Web Part Gallery Options. This will then display the Add Web Parts task pane to the right of the screen
5. In the Web Part List section, find Tasks by using the Next link at the bottom of the list
6. In Add To:, ensure Top Zone is selected and then click Add
7. To save the new Web Part on the page, click Publish at the top of the page

The Tasks List will now be incorporated in the Top Zone of the Home Page
Surveys are a useful tool for gaining feedback and gathering information and opinions from the site users. If you have sufficient permission you can set up a survey, but most users will only be able to respond to a survey. After a survey has been completed, the results are collated and can be viewed by users in order to see the responses.

In this session you will:

- learn how to respond to a survey
- learn how to recognise the different question types within a survey
- learn how to display the results of a survey.
TO RESPOND TO A SURVEY

Once a survey has been set up it can then be accessed by the users who need to respond. Depending on the survey settings users may only be able to respond to the survey once. It is also possible to view the survey results as users complete it. If the survey is designed to gather sensitive information it may have been set up so that responders are anonymous.

Try This Yourself:

Open File

1. Click the Survey name within the Quick Launch Bar to open it.
   Note: If the survey has not been included on the Quick Launch bar you can access the survey through View All Site Content and then finding the appropriate survey in the list.

2. In this example the Survey name is Feedback

3. Click Respond to this Survey

4. Work through the questions and then click Finish

For Your Reference...

To respond to a survey:
1. In the Surveys section in the Quick Launch Bar, click the name of the required survey
2. Click Respond to this Survey
3. Answer the questions and then click Finish

Handy to Know...
- Survey results can be displayed within SharePoint but for further analysis the results can be integrated with other applications such as Microsoft Excel
SURVEY QUESTION TYPES

Survey questions can be set up to store various kinds of information such as text, numbers, or even list of choices from a predefined list. Depending on the type of question the user will only be able to respond in certain ways to ensure the answers are appropriate and relevant.

Example Survey

This example survey includes various question types

**Single line of text**
- Maximum of 255 characters

**Multiple lines of text**
- The number of lines allowed are specified and this information can be formatted

**Choice**
- Radio buttons so only one choice allowed

**Rating Scale**
- Each sub question can be rated between 1 and 10

**Number**
- Any number can be entered

**Currency**
- Includes currency formatting when the survey is finished

**Lookup**
- The lookup items are taken from somewhere else within the SharePoint Site, in this example, the Events List

**Yes/No**
- Choose between Yes or No only
VIEWING SURVEY RESPONSES

Depending on the survey settings you may or may not be able to view the responses. One of the views available allows you to see the responses in a graphical format. This can be useful for identifying trends as it is sometimes easier to analyse the results in a graphical format. It can also be possible to view the individual responses to a survey.

To View Survey Results in a Graphical Format

1. Open the appropriate survey
2. Click Show a graphical summary of responses

This is an example of how the results are displayed in a graphical summary:

To View a particular Users responses:

1. Open the appropriate survey and click Show all responses
2. Click the user response you want to see
CHAPTER 10

VIEW DOCUMENTS IN A LIBRARY

Document libraries can contain hundreds of files and they are generally sorted in alphabetical order based on the file name. This may not be very helpful when you are trying to locate a file and can’t remember the name of it.

SharePoint provides various views which you can apply to the document library. These views include displaying documents in a spreadsheet format or by using Windows Explorer.

You can also sort and filter documents to help you find the required file quickly and easily.

In this session you will:

- gain an overview of the elements in a document library window
- learn how to use datasheet view in a document library
- learn how to use Windows Explorer to add files to a document library
- learn how to sort documents in a particular order
- learn how to find documents in a library using the filter feature
- learn how to apply custom filters in a document library
- learn how to open a document for reading purposes
- learn how to set an alert for a document
- learn how to edit or delete alert notifications
- gain an overview of how alert notifications work.
When you open a document library, you will generally see the contents in **Standard View**. Even if you change to a different view and then navigate to another area of SharePoint, upon your return to the document library, the contents will be displayed in Standard View. If you have sufficient permissions on the document library, you are able to change the default view.

**Standard View**

The document library window consists of columns which display information about a file. The default columns are **Type**, **Name**, **Modified** and **Modified By**. If you have relevant permissions on the document library, you can add, remove or create new columns of information.

**Type Column**

The Type column displays an icon that represents the file type. These icons will probably look familiar if you have used Windows Explorer or the Office suite of programs. If you are unsure about the file type, hover the mouse pointer over the icon and SharePoint will then display a tooltip which gives you more information about the file.

If the file icon includes a small white arrow with a green background, it means that the file is currently in use and you will not be able to edit it. The file has been Checked Out. (The Check In and Check Out procedure will be covered later in this section).

**Name Column**

As the title suggests, this column displays the file name. If there is a recently added or newly created file, the file name will include the ![New] indicator. The indicator usually disappears after 48 hours.

**Modified**

The date of the most recent modification to the file is displayed in this column. If a document is checked out, you will not be able to see the most up to date information; you will see the last saved version of the document.

**Modified By**

This column lists the names of the users who are responsible for the most recent changes to the file.
DOCUMENT LIBRARY DATASHEET VIEW

A document library can display information in different views. The datasheet view can be used to display the information in a format similar to an excel spreadsheet, (row and column format).

In this view you can perform various features such as displaying **Totals**, in order to calculate the number of files in the library.

### Try This Yourself:

**Open File**

1. Before starting this exercise you MUST open the default document library.

2. Within the document library, click the **drop down arrow** on the Actions menu and select **Edit in Datasheet**.

3. The datasheet view displays the library content in a spreadsheet format.

4. To calculate the number of files in the library you can use the totals feature within this view.

   From the Actions menu, select **Totals**

5. A blank row is inserted at the bottom of the datasheet with the heading **Totals**

6. Click in the total cell for the column called **Name**

7. Click the **drop down arrow** that appears in the cell and select **Count**

In this example, SharePoint has counted 14 files in the document library.

8. You can turn the Total row off, the same way you turned it on.

    From the Actions menu, select **Totals**

### For Your Reference...

To calculate the number of files in a library:

1. Within the document library, click the **drop down arrow** on the Actions menu and then click **Edit in Datasheet**

2. From the Actions menu, select **Totals**

3. Click the **drop down arrow** in a cell in the Total row and click **Count**

### Handy to Know...

- To return to the Standard View of the Library, from the Actions drop down list, select **Show in Standard View**

- If you navigate away from the library, upon your return, the library will revert back the Standard View.
Until you become comfortable with the SharePoint document library views, you may prefer to use Windows Explorer. This is the traditional method of navigating around a filing system which you may find easier to use. You can also use Windows Explorer to add files to the document library by using the drag and drop facility.

Try This Yourself:

1. Open File
   - Before starting this exercise you MUST open the default document library
   - From the Actions menu, select Open with Windows Explorer
   - The document library will remain open, and a separate window will open and display the files in Windows Explorer
   - To add more documents to the document library, you can use the Explorer window to navigate to the appropriate folder and then drag and drop the items into the library.
   - In the Folders pane, navigate to the folder on your computer or shared network area that contains the files you want to add to the library
   - Open the folder and select the required files
   - Ensure you can see the document library folder in the Folders pane and then drag the files into the folder.

   In this example there are four files being added to the document library

For Your Reference...

To add files using Windows Explorer:
1. From the Actions menu, select Open with Windows Explorer
2. Navigate to the folder that contains the files you want to add and select them
3. Drag the files into the Document Library folder

Handy to Know...
- Instead of using the drag and drop feature, copy and paste is just as efficient at adding files to a document library.
SORTING IN A DOCUMENT LIBRARY

An easy way to locate a specific document is to change the order of the files by using the sort facility. You can sort a document library in standard view and in datasheet view by using the column headings. If you know the date the file was last modified, you would be as well to sort the modified column, whereas if you know the file name, you would sort the name column.

Try This Yourself:

1. Open File
   Before starting this exercise you MUST open the default document library

2. Position the mouse pointer over the column heading called Type
   A drop down arrow appears next to the column name

3. Click the drop down arrow and select Ascending
   The documents are now listed by the type of file, i.e. Word documents are listed together, Excel files are listed together etc

4. Sorting works in the same way in datasheet view
   From the Actions menu, select Edit in Datasheet View

   Click the drop down arrow for the Modified column and select Sort Ascending.
   The files will now be listed in the order they were modified from the oldest to the newest date

For Your Reference...

To sort files in a document library:
1. Within the document library, click the drop down arrow on the required column heading
2. Select Ascending or Descending as appropriate

Handy to Know...
- If you navigate away from the document library, the next time you visit the library, the sort order will have reverted back to the default, which is normally by Name.
FILTERING IN A DOCUMENT LIBRARY

A document library can contain hundreds of files, and whilst sorting will help arrange the files in a useful order, you may still have an extensive list to search through. The **Filter** feature will allow you to choose the criteria in a particular column and then return only those items that meet the criteria. The other items are temporarily *hidden*, until the filter is removed.

**Try This Yourself:**

1. **Open File**
   - Before starting this exercise you MUST open the default document library.

2. **Display the document library in standard view**

3. **This example will filter out all the Word files (.doc) which were modified on the 31/03/2009. First we will filter for just the word documents**
   - Click the drop down arrow on the **Type** column heading and select **doc**
   - Only the word files are displayed

4. **Click the drop down arrow on the **Modified** column heading and select **3/31/2009**

5. **Notice that the columns that have been used to filter display the filter symbol 🔍**
   - To display all the files again, remove the filter
   - Click the drop down arrow on the **Modified** column heading and select **Clear Filter from Modified**.

6. **Repeat step 5 on the **Type** column heading.**
   - All files should now be displayed

---

**For Your Reference...**

**To filter documents in a Document Library:**

1. Click the drop down arrow on the required column heading
2. Select the appropriate criteria
3. To remove the filter, click the drop down arrow in the column heading and select **Clear Filter from**

**Handy to Know...**

- You may find that it is not possible to filter by certain columns, such as the name column in standard sheet view. The option to filter will not be available in the drop down list.
CUSTOM FILTERS

Filtering documents in standard view has a few restrictions, but as datasheet view works like a spreadsheet, this view has more functionality like Excel filters. In datasheet view you can filter a list by the name, you can’t do this in standard view. You can also enter custom criteria. This could be useful if you want to filter for files modified between two specific dates.

Try This Yourself:

1. Open File
   Before starting this exercise you MUST open the default document library
2. From the Actions menu, select Edit in Datasheet View
3. This example will filter all the files modified in the month of March 2009
   Click the Sort and Filter button on the Modified column heading and click (Custom Filter…)
4. Enter the criteria as shown and then click [OK]
   The library only displays items which were modified between the two dates specified
5. Click the Sort and Filter button on the Modified column and click (Show All) to display all the items.

For Your Reference…
To use a custom filter:
1. Display the document library in datasheet view
2. Click the Sort and Filter button on the required column heading
3. Enter the criteria and then click [OK]

Handy to Know…
• You can apply a custom filter to multiple columns in order to see the required files.
OPEN A DOCUMENT

If you want to open a document in order to just view the information without editing, it is often better to open it as a read only copy. This will mean that other users can still access the file and edit it if necessary. If another user already has the file open, you will probably only be able to open a read only copy of the file anyway.

Try This Yourself:

1. Locate the file that you wish to open and click once on the file name
2. Select Read Only and click [OK]
3. Notice that the title bar of the window displays the (Read-Only) notification next to the file name
4. The message bar in the Word application also advises that in order to edit the document, you must check it out
5. Try to type something on the document and you will find that nothing happens, but the status bar will advise that you cannot make changes as the selection is locked
6. Once you have read the document, close it in the normal manner

For Your Reference...

To open a document:
1. Locate the required document and click the file name
2. Select Read-Only and click [OK]

Handy to Know...
- Depending on how SharePoint is configured, you may find that you are able to type information into a file that has been opened in Read Only mode, but you will not be able to save the changes. However, you may be able to save the amended document with a different name.
**DOCUMENT ALERTS**

An alert will create an e-mail message notifying you when there are changes made to a specified document. This can be useful if you need to keep track of what is being changed and by whom. You can also choose how often you receive the e-mail notification. If a document is likely to be updated once, you may need notifying immediately. Or you may prefer a daily or weekly summary.

Try This Yourself:

1. **Open File**
   
   Before starting this exercise you MUST open the default document library.

2. **Point to the required document with the mouse and then click the Edit arrow**

3. **From the menu, select Alert Me**

   The page displayed will allow you to choose the settings for your alert.

   Accept the default **Alert Title** *(This is usually the document name)*

4. **Accept the default **Users**: as your email information has been entered automatically.**

5. **Select Anything Changes** to receive notification about all changes to the document.

6. **Select Send a daily summary** from the frequency section and enter the time 9:00 AM.

7. **Click [OK]**

   Once you have created an Alert, you will receive an email message advising that you have successfully created an alert.

For Your Reference...

To set a document alert:

1. Click the **Edit Arrow** on the appropriate file
2. Click **Alert Me**
3. Complete the **New Alert** page with the required settings and click [OK]

Handy to Know...

- In addition to setting document alerts, you can also set an alert for an entire library, so you are notified of changes to all documents within the library.
MANAGE ALERTS

There may be a point where you no longer need to be alerted about the changes to a document, but until you remove the alert, you will still continue to receive the notifications. If you find that you receive too many notifications about the same document, again you can change the settings so that you are advised less frequently. This can help with controlling the amount of email traffic.

Try This Yourself:

Open File

1 All your Alerts are managed from one location. From the Global Links Bar, click your name to display the menu and select My Settings.

2 Click My Alerts

3 All documents for which you have created an alert will appear on the page. To delete an alert, select the check box for the relevant alert and then click Delete Selected Alerts.

4 To amend alert settings, click the name of the item in the list to display the Edit Alert page.

5 Change the settings as required and then click [OK].

For Your Reference...

To edit or delete a document alert:

1. From the Global Links bar, click your user name and then click My Settings.
2. Click My Alerts.
3. Click the required item name to display the Edit Alert page.
4. Make amendments and then click [OK].

Handy to Know...

• Alerts can be set on other SharePoint items, such as announcements, news items, and many more. All alerts are managed through My Settings.
**Alert Notifications**

When setting an alert for an item, SharePoint will generate a confirmation message to advise that the alert has been created successfully. You will then start to receive notifications about items according to the specific alert settings. Using alerts alleviates the laborious task of manually checking which items have recently been updated.

---

**Successful Notification**

The notification below is an example of the message you will receive once the alert has been created successfully. It also provides a handy link to your alerts page if you need to change the way the alert works.

You have successfully created an alert for 'Asset Items.xlsx'
Document Center
To: Jane

Alert 'Asset Items.xlsx' has successfully been added on Document Center.

You will receive alerts in e-mail. The timing and criteria for the alerts depend on the settings entered when the alert was added.

You can change this alert or any of your other alerts on the My Alerts on this Site page.

---

**Update Notification**

The message below is an example of the notification you may receive about the changes to a specific document. The Daily Summary displays a list of all the changes made each day.

Documents: Access Help.doc
Document Center
To: Jane

Documents - Daily Summary

<table>
<thead>
<tr>
<th>Title</th>
<th>Modified</th>
<th>Modified by</th>
</tr>
</thead>
<tbody>
<tr>
<td>Access Help.doc</td>
<td>4/6/2009</td>
<td>Jane</td>
</tr>
<tr>
<td></td>
<td>9:07 AM</td>
<td>Edited</td>
</tr>
</tbody>
</table>

Alerts can create quite a bit of email traffic so it is a good idea to monitor your alerts and delete them when they are no longer required.
A SharePoint site provides you with a default document library that can be used to store and share files with other users. The name of this default document library is simply *Documents*, or in some situations, *Shared Documents*.

Multiple document libraries can exist within a SharePoint site and they work in a similar manner to a directory on your computer's hard drive.

You can create new files within a document library or you can upload existing files from your computer or network shared area. Either way, it means you have quick and easy access to shared files.

**In this session you will:**
- learn how to display the default document library
- learn how to create a new word document within a document library
- learn how to close a document
- learn how to upload a single document to a document library
- learn how to upload multiple files at the same time.
THE SHARED DOCUMENT LIBRARY

The shared document library is located in the **Document Center** and it is the default library provided by SharePoint. The library may be called **Shared Document**, or just **Documents**. A document library is designed to store various file types, such as Office documents, e.g. Word and Excel. Files created in other programs are also acceptable.

---

**Try This Yourself:**

Before starting this exercise you MUST navigate to the SharePoint site in your web browser

1. Navigate to the **Team Site**
2. Click the **Document Center** tab in the Top Navigation Bar
3. Click **Documents** in the **Quick Launch Bar**

The document library is displayed along with a list of the contents

---

**For Your Reference...**

To display a document library:

1. Navigate to your Team Site
2. Click the **Document Center** tab in the top navigation bar
3. Click **Documents** in the **Quick Launch Bar**

---

**Handy to Know...**

- You can store almost any type of file in a document library, but in order to work with the file, your computer must have the appropriate editing program installed.
CREATE A NEW DOCUMENT

You can create a new Word document directly within a document library. This removes the need to open the Word application beforehand as SharePoint will open the program for you.

When creating a new document, the default program is usually Microsoft Word. However, it is possible to change the default file so that new documents use other file types, such as Excel.

Try This Yourself:

Before starting this exercise you MUST display the default document library

1. From the document library menu bar, click the drop down arrow on the New menu and click Document

2. If presented with the warning message about files that can harm your computer, click [OK]

3. Enter your user name and password in the Connect to... dialog box. (If your system is only accessible internally, you may not be required to sign in to connect)

4. Type the information into the Word document and then use the Save As command to save the document

5. In the Save As dialog box, use the default location specified. (As you have created the document from within the document library, Word will assume that this is where the document needs to be saved)

6. Enter the name “References” for the file and click Save. (To save the document in compatibility mode, ensure the save as type is Word 97-2003 Document)

For Your Reference...
To create a new document in a library:
1. Click the drop down arrow on the New menu and select Document
2. Click [OK] to the warning message
3. Enter your username and password
4. Type the information in the document
5. Save the document in the default location

Handy to Know...
- Most document libraries will have a default template which is automatically used when creating new documents in a library. This template will have been set up by the library administrator and is generally safe to use. If you are at all unsure, do not open the file.
CLOSE A DOCUMENT

When you have finished working with a new document you can close it in the normal manner. However, SharePoint will prompt you for other information before the close process is complete.

If you want other users to be able to see your document in the library, you must **check in** the file. You are also asked for **version comments** which can be useful when checking version history.

---

**Try This Yourself:**

1. **Open File** Before starting this exercise you MUST still have the "References.doc" file open
2. **Close** the file in the normal manner
3. The server automatically checks out a new document when it is being edited, so it is necessary to check the document back into the library in order to make it visible to other users
   - Click [OK] to the information message when prompted
4. After the information message, the next message that appears will allow you to check the document in
   - Click [Yes] to check in the document
5. Another message is displayed prompting for version comments. As the document is the first major draft, select 1.0 Major version (publish)
6. Enter the comments as shown and then click [OK]
7. The document is now available in the document library

---

**For Your Reference...**

To close a document:

1. Click the **Close** icon within the application
2. Click [OK] to the information message
3. Click [Yes] to check in the document
4. Select the **Version Type** and enter **Comments** (if applicable), then click [OK]

**Handy to Know...**

- Recently created or added files to a document library are displayed with the **New** indicator. This usually disappears after 1 to 2 days.
UPLOAD A SINGLE DOCUMENT

If you have existing documents that need to be stored in a document library, you can simply upload them. When uploading documents you can choose whether to upload single files or to save time, you can upload multiple files. The original files are not affected and uploading the documents is almost like creating a copy and storing them in a different area.

Try This Yourself:

Before starting this exercise you MUST display the default document library

1. From the document library menu bar, click the drop down arrow on the Upload menu and click Upload Document

2. Click [Browse], then navigate to and select the appropriate file and then click [Open]

The current file path of the document will display in the Name: box

3. Version comments can be useful when tracking the history of a document, but are optional rather than required

Enter Version Comments (if appropriate), then click [OK]

4. SharePoint will advise that the upload has been successful and the document will need to be checked in before other users can access it

Click [Check In]

The document is displayed in the document library

For Your Reference...

To upload a single document:

1. Click the drop down arrow on the Upload menu and click Upload Document

2. Click [Browse], then navigate to the required file, select it and click [Open]

3. Enter Version Comments and click [OK]

4. Click Check In to add to the library

Handy to Know...

- The property called Document Title is optional but you may find that it is automatically populated. This information is taken from the original file properties that were entered during the file creation.
UPLOAD MULTIPLE FILES

You can use the document library to upload existing files. If you have quite a few files, you can use the Upload Multiple Documents feature to save time. The files that need to be uploaded must be located in the same folder as it is not possible to choose multiple files from different folders on your computer or network shared area.

Try This Yourself:

Before starting this exercise you MUST open the default document library

1. From the document library menu bar, click the drop down arrow on the Upload menu and then click Upload Multiple Documents

SharePoint displays the directory structure of your computer or network

2. Use the tree structure on the left side of the window to navigate to the appropriate folder and select the folder

3. The right side of the window then displays the contents of the selected folder

4. Tick the check box for all the files that need to be uploaded and click [OK]

5. A message will appear asking if you want to continue with the file upload

   Click [Yes]

5. The Upload Progress window will stay on screen whilst the files are being uploaded so that you can monitor the progress

For Your Reference…

To upload multiple documents:

1. Click the drop down arrow on the Upload menu and select Upload Multiple Documents

2. Navigate and select the appropriate folder, select the files and click [OK]

3. When prompted, click [Yes] to upload

Handy to Know…

- You may already have files in a document library that have the same names as the files you are uploading. To ensure that the files in the library are overwritten with the uploaded version, select “Add as a new version to existing files”. If this option is not selected, files which already exist will not be uploaded.
If you need to amend a document, this can be done from the document library. It is not necessary to open the authoring application as SharePoint will do this for you, (providing the program is installed on your PC).

In order to combat the age old problem of multiple users updating the same file at the same time, SharePoint has included some extra safeguards. The check in and check out procedure will allow users to see if the document is currently being worked on. If it is, then SharePoint will display the name of the user who is using the file.

Version control is another useful feature as it allows you to monitor the document history so you can see when changes were made to the file and by whom.

**In this session you will:**

- learn how to edit a document using the standard view
- learn how to use datasheet view to edit documents
- understand the purpose of check in and check out
- learn how to check out a document from a library
- learn how to check in a document
- learn how to delete unwanted documents
- understand the versioning settings in a Document Library
- learn how to view document versions
- learn how to delete document versions
- learn how to promote a prior version of a document to be the current version
- learn how to restore a deleted item back to its original location.
EDIT A DOCUMENT IN STANDARD VIEW

When using standard view in a document library, if you open the file, SharePoint will always try to open it as a Read Only file; however, there are various methods of changing the document to make it editable. If you leave the file in Read Only mode, you will not be able to save the changes to the document, and in some cases, you may not even be able to save a copy of the file.

Try This Yourself:

1. Open File
   - Within the document library click the file name and when prompted, select Check Out and Edit and then click [OK]

2. Enter your username and password if required

3. Edit the document accordingly and Save the changes to the file
   - When you save the changes to the file, you are essentially uploading the changes. SharePoint will display the Saving window to show the Save progress

4. Close the document and you will be prompted to check in the document

5. In order to allow other users to see the updated file, click [Yes] to check in the file

6. Enter the appropriate version information and click [OK]

Tip: An alternative method of opening a document in edit mode is to click the Edit arrow to the right of the file name, and select Edit in Microsoft Office Word

For Your Reference...

To edit a document in standard view:
1. Within the Document Library, click the file name
2. Select Check Out and Edit and click [OK]
3. Or, click the Edit button for the file and click Edit in Microsoft Office Word

Handy to Know...

- Using right click will not display the appropriate options for editing the documents whilst working in standard view.
EDIT A DOCUMENT IN DATASHEET VIEW

Some users may prefer to work in datasheet view as opposed to standard view, but the process of editing documents is virtually the same. The main difference between the two views is that you can use a right mouse click in datasheet view to display a list of options, whereas in standard view, you use the Edit arrow to the right of the file name.

Try This Yourself:

1. Open File
   - Before starting this exercise you MUST open the default Document Library.
2. Within the document library, from the Actions menu, select Edit in Datasheet View.
3. Click the file name to open the document (enter your username and password if required).
4. SharePoint will open the document as Read-Only, but you can make it editable.
   - Click the Check Out button on the message bar.
5. Click [OK] to the Edit Offline message.
6. Amend the document accordingly and then save the changes.
7. Close the document and when prompted, click [Yes] to check in the document, enter Version information and click [OK].
   - Now try editing a file using the right click method.
   - Right click on the file name, point to Document and select Edit Document.
   - The remainder of the process should look familiar.

For Your Reference…

To edit a document in datasheet view:
1. Right click the file name
2. Point to Document and click Edit Document

Handy to Know…

• Offline Editing allows you to work on a document without being connected to the internet. You can check out the document and store it in the SharePoint Drafts folder on your C:/ Drive. Once you have finished the amendments, you simply check it back in and the new version is uploaded to SharePoint.
CHECK IN AND CHECK OUT PROCESS

A document library works a bit like a physical library. If you borrow a book, you are basically taking out the book so that you are the only person who can read it and you have exclusive control. Other users know the book exists, but it isn’t currently available to them, as you have it. When a document is checked out of a library, the last saved version is available to other users.

Check Out

You will probably find that if you need to edit a document, SharePoint will nearly always force you to check out the document before you can make any changes to it, regardless of which library view you are using.

Checking Out a document will let other users know that they will not be able to edit the original document and must wait for it to be checked back in.

A document which is currently checked out can be identified by the “Checked Out” icon. Simply hover the mouse over the icon and you will be able to see who has the document in use.

If you intend to work on the document for a while, it is recommended that you keep the document checked out, even if you don’t have it open, keeping the document checked out will prevent other users from trying to edit it.

Check In

Once you have finished working with a document, you will be prompted to check the document back in. This means that other users will now be able to view the changes and they will also be able to edit it themselves as you no longer have exclusive control.

A document library can be set up to include version control, meaning that every time a document is edited and checked back in, SharePoint will prompt for information about this version. This is particularly useful for tracking the history of a document. Likewise, version history can be turned off for the document library if it is not required.

SharePoint will automatically allocate a number to the version when you check the document in. Major versions will be given the next sequential integer; minor versions will be allocated the next sequential number to 1 decimal place, e.g. 1.0 (major), 2.0 (major), 2.1 (minor).

Versions

In a document library you can change the settings so that you can choose which users are able to see the various versions of a document.

If a document library has content approval switched on, you can also control which version of the document is actually published to the library and available to the public.

Depending on the library settings, there may also be a limit to the number of versions that can be stored for one document.

Refresh

Changes to a document library are almost dynamic, but you may find that you need to refresh the page. A document may look checked out but if you are sure you checked it back in, simply refresh the screen to update the page.
CHECK OUT A DOCUMENT

Depending on the document library set up, you may find that you can edit a document without checking it out first. This is quite handy if you have small changes to make that won’t take too much time. But beware; the “lock” you have on the document is only temporary as it has not been checked out. This could result in another user editing your document at the same time!

Try This Yourself:

Before starting this exercise you MUST open the default document library

1. In *Standard View*, click the Edit button to the right of the file name and click Check Out

2. In *Datasheet View*, right click the file name, point to Document and then click Check Out Document...

Tip: Whilst working in datasheet view, any files which are currently checked out do not display the checked out icon as with standard view.

In order to see who has the document checked out in datasheet view, the current view will need to be amended in order to display the Checked Out column.

For Your Reference...

To check out a document:

1. In *Standard View*, click the Edit button to the right of the file name and click Check Out

2. In *Datasheet View*, right click the file name, point to Document and click Check Out Document...

Handy to Know...

- When working with standard view, if you accidentally check out the wrong file, you can simply click the Edit button and click Discard Check Out... this means you will not have to enter version information.
CHECK IN A DOCUMENT

When you have finished editing a file it should be checked in. This is so that other users can see the new version that you have created and they will also be able to check out the document for further editing. You are usually prompted to check in the file when you close it, but if you have left a document checked out by mistake, you do not need to open it to check in again.

Try This Yourself:

1. Working in standard view, click the Edit button to the right of the file name, and then click Check In.
2. Select the version and add version Comments (if required) and then click [OK].

The modified column in the library will display the current date and time to indicate the last change.

3. Working in datasheet view, right click the file name, point to Document and then click Check In Document…
4. Select the version and add version Comments (if required) and then click [OK].

For Your Reference…

To check in a document:
1. In standard view, click the Edit button to the right of the file name, and then click Check In.
2. In datasheet view, right click the file name, point to Document and then click Check In Document…
3. Enter version information and click [OK].

Handy to Know…

- If you the document displays the checked out icon, you may need to refresh the page in order to see that a document has been checked in.
- If you inadvertently leave a document checked out, an administrator can override the checked out status and check in the document.
DELETE A DOCUMENT

If a document is no longer needed, you can delete it from the document library. Items deleted within SharePoint are not deleted permanently. They are transferred to the

SharePoint Recycle Bin. By default, the recycle bin will only retain items deleted within the last 30 days; anything older will be automatically emptied.

Try This Yourself:

Open File

1. Before starting this exercise you MUST open the default document library

2. In standard view, locate the document you wish to delete

3. Click the Edit button for the document and click Delete

2. In datasheet view, right click the document you wish to delete and click Delete Document

3. When prompted, click [OK] to send the item to the site Recycle Bin

For Your Reference...

To delete a document:

1. In **standard view**, click the **Edit** button for the document and click **Delete**

2. In **datasheet view**, **right click** the document and click **Delete Document**

3. Click [**OK**] to sent the item to the site Recycle Bin

Handy to Know...

- The SharePoint administrator is able to change how long items stay in the recycle bin, but the default is usually 30 days.
- Deleting an item will also delete any versions of the item as well.
**DOCUMENT VERSIONS**

Using document versions keeps a history of the changes and progress of a document. Each document library can have its own versioning settings which manage how the versions work. Version settings can also be applied to other SharePoint elements, such as lists and calendars. Only a user who has sufficient permission will be able to change the versioning settings.

---

**Content Approval**

When Content approval is set to **Yes**, new or amended documents are kept in a draft state until they are ready to be published for everyone to see and approved by the appropriate person.

For example, if an organisation stores their policies and procedures in a document library, any changes to a document may have legal implications. The legal department may need to approve the changes before it can be published for everyone to read.

---

**Document Version History**

This section allows you to specify whether versions should be created every time a file is edited.

New files are automatically allocated the number 1 as the first major version of the document. Major versions will always assign the next sequential whole number, whereas minor versions are incremented by 0.1.

For example, if you were to add or delete information from a document, this would be considered a **major** amendment and therefore require a major version number. However, if you were to perform a spell check or change the format of a title in the document, then this would be deemed as a **minor** amendment and require a minor version number.

Creating versions for documents can easily spiral out of control and you may find that you have multiple useless and irrelevant versions of a document. Limiting the number of versions will combat this problem and if new versions are to be created, it will prompt users to delete the versions which are no longer required.

---

**Draft Item Security**

When working on a document, you may not want all users to see the document progress (draft versions). If a Document Library has content approval set, you can restrict which users are able to see the draft versions of your document.

---

**Require Check Out**

Using Check Out and Check In is an easy way of tracking who is working with the document and it can also prevent two users trying to update the document at the same time.
VIEW DOCUMENT VERSIONS

You know that when you add a new document to a document library or a document is amended, a version is created. In order to see the progress of a document you may need to view one of the previous versions. Displaying the version history will include each version and version number along with the date and time it was modified, by whom it was modified, and any comments.

Try This Yourself:

Before starting this exercise you MUST open the default document library

1. In standard view, click the Edit button for the required File and click Version History
   OR
2. In datasheet view, right click the required file, point to Document and click Document Versions...

   1. Click the Date and Time of the document version. The document will open within the authoring program.

For Your Reference...
To view document versions:
1. In Standard View, click the Edit button for the file and click Version History
   In Datasheet View, right click the file, point to Document and click Document Versions...
2. Click the Date and Time of the required version

Handy to Know...
• If there are multiple major versions, SharePoint will indicate which the current published major version is.
DELETE DOCUMENT VERSIONS

Good file management is the key to ensuring you have up to date and relevant information. Managing document versions is no different. It is good practice to delete old versions that are no longer required. You may also find that there is a limit to the number of document versions you can create. This depends on the document library settings.

Try This Yourself:

1. Open File
   Before starting this exercise you MUST open the default document library
2. Display the Version History for the required document
3. Click the Edit button on the version that you wish to delete
   In this example we are going to delete the minor version 1.1
4. Click Delete
5. When prompted, click [OK] to send the version to the site Recycle Bin
6. The version no longer appears in the list
   If you have multiple versions of a document, you may want to delete all the minor versions, or even all versions. This can be done in one fell swoop
7. Display the Version History for the required document
8. Click Delete Minor Versions to remove all minor versions and leave the major versions
   Click Delete All Versions to remove all versions except the current published major version

For Your Reference...

To delete document versions:
1. Display the Version History
2. Click the Edit button on the version to be deleted
3. Click Delete
4. Click OK to send the version to the site Recycle Bin

Handy to Know...

- If you delete the current published major version, the previous major version will take its place as the document that users can see
RESTORE DOCUMENT VERSIONS

You may find that the current published version of a document is not correct and you need to revert back to a previous version of a document. Rather than making amendments to the current published version it is possible to restore a previous version. Using this method, you are guaranteed to have all the information in the document without the task of retyping data.

Try This Yourself:

Before starting this exercise you MUST open the default document library

1. Check Out the document first
2. Display the Version History for the document
3. Click the Edit button for the version to be restored. In this example, we will be promoting the version number 2.1
4. Click Restore
5. When prompted that you are about to replace the current version with the selected version, click [OK]

A new version of the document is created and has been allocated the number 5.1, but it is not a major version and therefore not published yet

6. Return to the Document Library and Check In the document
7. Select Major version (publish) and click [OK]

Check the Version History and you will now see Version 6.0 is the current published major version which is actually a copy of the version 2.1

For Your Reference...

To restore a document version:
1. Check Out the document first
2. Display the Version History
3. Click the Edit button for the required version
4. Click Restore and click [OK] to replace the current version
5. Check In the document as a Major version

Handy to Know...

- If you try to restore a previous version of a document without checking out the document first, SharePoint will display a windows message indicating that you need to check out the document first
RESTORE DELETED ITEMS

Just like your desktop, SharePoint has a Recycle Bin that stores all deleted items. In an environment where multiple users have access to the files, it is useful to be able to retrieve items that have been deleted in error. The default settings for the site Recycle Bin will only keep items for 30 days, but this can be changed by the SharePoint administrator.

Try This Yourself:

1. Before starting this exercise you MUST open the Document Center

   Within the Document Center, click Recycle Bin from the Quick Launch Bar

2. Select the item to be restored by ticking the check box

3. Click Restore Selection

4. When prompted, click [OK] to restore the file

   The file will be placed back in location from which it was originally deleted.

For Your Reference…
To restore a deleted item:
1. Click Recycle Bin from the Quick Links menu
2. Tick the check box for the required item
3. Click Restore Selection
4. Click [OK]

Handy to Know…
- When a deleted item is restored, all the versions are also restored
CREATING LIBRARIES

SharePoint provides many default libraries, such as the document library which is commonly referred to as Documents or Shared Documents.

As well as document libraries, it is also possible to create more libraries that store other kinds of information, such as a picture library and a wiki page library.

Libraries are simply places to store various types of information and you can create extra libraries within your SharePoint site.

In this session you will:

- learn how to create a wiki page library
- learn how to create a picture library
- learn how to create a slide library
- gain an overview of the default settings within a Library
- gain an overview of the various column and data types that can be stored
- learn how to add an existing SharePoint column to a library
- learn how to create a new column within a library
- learn how to create a new view for library.
CREATE A WIKI PAGE LIBRARY

Unlike traditional web pages which are updated and maintained by one person, a wiki page is designed to be edited and amended by the users. This means that the onus of the page is shared rather than being the responsibility of one or two people. A wiki page library grows by linking pages and information together and is useful in a business environment for recording details.

1. Within the SharePoint site, click View All Site Content from the Quick Launch Bar and then in the All Site Content page, click Create

2. From the Create page, click Wiki Page Library in the Libraries section

3. Enter the Name and Description for the Wiki Page Library

4. Click Create

The Wiki Page Library can now be accessed via the Quick Launch Bar
CREATE A PICTURE LIBRARY

Whilst it is possible to store picture files in a document library, it is a good idea to create a library specifically for pictures. This kind of library is particularly useful for storing images such as company logos or personnel pictures. It is also possible to display the images in a picture library as thumbnails so it is easy to find the image.

1. Within the Team Site, click View All Site Content and then click Create from the Site Content page.

2. From the Libraries section, click Picture Library.

3. Enter the settings for the picture library and then click Create.

Tip: By allowing incoming email, users can store pictures in this library without having to upload the images.
CREATE A SLIDE LIBRARY

A slide library is designed to contain PowerPoint slides and slides from other compatible slide show application. This type of library has features which help the user find, manage and reuse the slides in other presentations.

4. Within the Team Site, click **View All Site Content** and then click **Create** from the Site Content page

5. From the Libraries section, click **Slide Library**

6. Enter the settings for the Slide Library and then click **Create**
CHANGE LIBRARY SETTINGS

Over time and usage, the purpose of a library may change, so it may be necessary to change the settings of the library. The settings control the default behaviour of the library. There are also extra settings which can be applied in order for the library to work more efficiently.

Accessing the Library Settings

If you have sufficient permission to change the settings of a library, you will be able to see the Settings menu within the library. The setting options may vary depending on the type of library you are amending.

1. Display the library and then from the Settings menu, click Document Library Settings.
2. Select the appropriate setting, make the changes and click OK or Save.

General Settings

This section allows you to change these settings:-

- Title and description of the library, and whether a short cut is visible on the Quick Launch Bar
- Specify whether content should be approved and if check out is required
- Document versions are created and version numbering system
- Who has access to draft items (minor versions of a document) and the Document Template for the library
- How files are displayed when opening them (client application or web page)
- If New Folders can be created within a library and if the library appears in search results

Permission and Management

This section allows you to change these settings:-

- Delete the Document Library and all its contents
- Save this document library so it can be used as a template for new libraries
- Manage the permissions for users and groups for the library
- Take ownership of checked out files
- Apply and manage the type of workflow for the library
- Set up a policy for the various content types in the library

Communications

This section allows you to:-

- Create an email address for the library so that users can send items to the library directly via email
- Control how emailed items are stored
- Modify the information that is contained within the RSS feed if users subscribe to it
ABOUT LIBRARY COLUMNS

In all libraries, information is displayed in columns such as Type, Name, Modified and Created etc. There are further built in columns of information that can be added to the library in order to record more information about the file. It is also possible to create your own custom columns of information.

Existing Site Columns

There are over 150 other built in columns that can be included in the document library and they can contain various types of information such as text, numbers and dates. When you include one of these columns in the view, you can enter the information through the document properties.

Create a New Column

If the built in columns aren’t relevant to the type of information you want to store about the file, you can create your own custom column. As well as specifying a name for the column, you can also select a data type for the information:

<table>
<thead>
<tr>
<th>This type:</th>
<th>Stores this data information:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Single line of text</td>
<td>Stores up to 255 characters</td>
</tr>
<tr>
<td>Multiple lines of text</td>
<td>Can be unlimited and you specify the number of lines available for editing</td>
</tr>
<tr>
<td>Choice</td>
<td>List of choices to choose from and displayed as a drop down menu, radio buttons or checkboxes. (The checkboxes option allows multiple selections)</td>
</tr>
<tr>
<td>Number</td>
<td>Stores any value, but you can also set a minimum and maximum value and the number of decimal places to show</td>
</tr>
<tr>
<td>Currency</td>
<td>Stores any value, but you can also set a minimum and maximum value with a specified number of decimal places. The main difference between Currency and Number is that you can select a Currency symbol for the Currency type.</td>
</tr>
<tr>
<td>Date and Time</td>
<td>Allows the user to enter a date or date and time. You can also choose to insert today’s date automatically or calculate a date</td>
</tr>
<tr>
<td>Lookup</td>
<td>Provides a list of information that already exists within the site, such as a list of files within a document library</td>
</tr>
<tr>
<td>Yes/No</td>
<td>Provides a simple check box for a yes/no field</td>
</tr>
<tr>
<td>Person or Group</td>
<td>Allows the user to include people or groups in the column</td>
</tr>
<tr>
<td>Hyperlink or Picture</td>
<td>Allows the user to store internal and external links to other pages and pictures</td>
</tr>
<tr>
<td>Calculated</td>
<td>Create formula using the existing column in order to perform a calculation on the information</td>
</tr>
<tr>
<td>Business data</td>
<td>If the Business data types have been loaded into SharePoint, you will be able to select one of them</td>
</tr>
</tbody>
</table>
ADD A SITE COLUMN TO A LIBRARY

A library view generally consists of columns which provide core information about a file, but it may be necessary to record further information such as progress, completion or even billing information. Fortunately, SharePoint has already created many of the columns which can be added to the view of the Library.

Try This Yourself:

Before starting this exercise you MUST open the default document library

1. Click the Settings menu and then select Document Library Settings

2. Under the Columns section, click Add from existing site columns

3. From the list of Available site columns, click Billing Information and then click [Add]

4. Click [OK]

5. The new column will appear in the library standard view

For Your Reference…

To add an existing site column to a library view:

1. Within the Library, click the Settings menu and select Document Library Settings
2. Under the Columns section, click Add from existing site columns
3. Select the required column and click Add
4. Click [OK]

Handy to Know…

- In order to enter information into the new column, click the Edit button for the required file and then click Edit Properties.
CREATE A NEW COLUMN

As you know, SharePoint provides quite a few extra columns which can be included in a SharePoint library. However, it may be that the information you need to store is unique. Creating your own custom column will allow you to give the column an appropriate name and also specify the type of data it should contain. In this example we will use the **Choice** column type.

**Try This Yourself:**

1. **Open File**

   Before starting this exercise you MUST open the default document library

2. **Create Column**

   In order to prevent users entering an incorrect department name, we will create a column which provides a list of the departments.

   From the **Settings** menu, click **Create Column**

3. **Select Choice**

   Enter Department for the Column Name

4. **Complete settings**

   Select **Choice** from the type of information

   Complete the rest of the settings as shown in the image

5. **Click [OK]**

6. **Let’s try using the new columns to input information.**

   Return to the Library and click the Edit button for one of the files

7. **Click Edit Properties**

8. **From the Department drop down list, choose Sales and then click [OK]**

**For Your Reference…**

To create a new column:

1. Within the Library, click the **Settings** menu and then click **Create Column**

2. Complete the settings

3. Click **[OK]**

**Handy to Know…**

- By adding the column to the default view, it means that all other users will be able to see this information.
LIBRARY VIEWS

Most libraries usually include three views, *All Documents* (Standard View), *Datasheet View* and *Explorer View*. It is also possible to create your own views which you can share with other users by making it public, or you can simply use for yourself by making it personal. Either way, a view can include sorting, filtering and grouping options to help you locate files quickly.

Create a View

- Within the library, click the **Settings** menu and then click **Create View**

View Types

- Choose a **View Format**

View Settings

- Enter the appropriate settings for the view and then click **[OK]**

Using a View

Click the drop down arrow on the **View** menu and select the new View.
CHAPTER 14 M AINTAIN A DOCUMENT LIBRARY

In this session you will:

• learn how to create a new Document Library
• explore the different types of files that can be used as document templates
• learn how to create a new document template for a document library
• learn how to override check out
• learn how to create a new view for a document library.

The default document library provided by SharePoint means that you can start using the document library immediately, but it is not good practice to store every single file in the same library.

In the same way that you organise your files on your PC, you may find that it is useful to set up multiple document libraries in order to arrange files in a logical manner.

For example, in an organisation that has many departments and in multiple locations, it would be appropriate to store all organisation templates for the finance department in a library called Finance Templates. This means that users in the finance department can quickly locate the files they need.
CREATE A DOCUMENT LIBRARY

With a SharePoint site, it is possible to create many document libraries in order to organise files efficiently. When creating a new document library, you can also specify what type of files will be stored in it. This can be particularly useful if you need to store files other than Word documents.

Try This Yourself:

Before starting this exercise you MUST open the Document Center
1. Click the Site Actions button on the Navigation Bar and click Create
2. From the Create page, click Document Library
3. Enter the appropriate information and click Create

Name and Description
The document library name will be used in heading and links throughout the site. The description tells the user how the library is used. This can be useful for visitors or new users to the SharePoint site

Navigation
This option allows you to specify whether a link to the library appears in the left side of the window in the Quick Launch Bar

Incoming Email
Users can send e-mail messages directly to the document library by using the e-mail address specified

Document Version History
This option allows you to specify whether versions are created every time you edit a file

Document Template
This template is used whenever you create a new file from within the document library. In this example the default file type will be a Word document

For Your Reference...
To create a document library:
1. Click the Site Actions button on the Navigation Bar and click Create
2. From the Create page, click Document Library
3. Enter the appropriate information and click Create

Handy to Know...
- Whilst the document template for the library may be a Word document or an Excel workbook, the library is not restricted to these types of files; you can still add other types of files to the library.
DOCUMENT TEMPLATES

A template is a file that is used as a base for creating new files. The template may contain default settings such as page margins, font, font size and font colour, so that every new file created from the template includes the same defaults. This can be useful if your company has a standard font and font size, as the default template can be set up to incorporate these elements.

Setting up the Document Template

The Document Template to be used in the document library is chosen when the document library is first created; however, this can be changed at a later date if required.

You can choose from many page types or programs to specify as the document template, but they must be compatible with SharePoint and the programs must be installed on the client computer.

Which template should you choose?

The document template does not restrict the document library to contain only this type of file. It is merely used as a quick way of creating a new file when you click the New button within the document library.

For example, a document library may contain training materials such as handouts, manuals, quick learning guides and it is probable that these files will be Word documents. Therefore it makes sense to assign a Word Document Template to this document library.

Microsoft Office Programs

Microsoft Access is not available as one of the default templates, but Word, Excel, PowerPoint and OneNote can be used.

<table>
<thead>
<tr>
<th>Application</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Word</td>
<td>Word is a Word processing application that provides powerful tools for creating professional documents such as reports, letters, manuscripts, newsletters and much more.</td>
</tr>
<tr>
<td>Excel</td>
<td>Excel is a spreadsheet program that can be used to efficiently analyse and manipulate large amounts of data. It can also perform complex calculations and produce comprehensive charts to illustrate data.</td>
</tr>
<tr>
<td>PowerPoint</td>
<td>PowerPoint is used to create effective slide shows in order to assist the presenter deliver successful and interesting presentations.</td>
</tr>
<tr>
<td>OneNote</td>
<td>OneNote basically works like an electronic notebook. Just like you separate your notes with page dividers, OneNote uses sections in order to organise information.</td>
</tr>
</tbody>
</table>

Which version of Office should you choose?

SharePoint 2007 allows you to choose between using Office 97-2003 files or Office 2007 files. In an environment where users may have different versions of Office installed on their computers, it may be worthwhile specifying Office 97-2003 versions for the template so that all users will be able to create, access and edit the files sufficiently.

Web Page Templates

There are also three types of web page templates which can be used as the document library default template. These types of files will create HTML or MHT files and can be viewed using a simple web browser.
**CHANGE THE LIBRARY DOCUMENT TEMPLATE**

The document library template is stored in a folder called *Forms*, which resides within the document library. You can modify this template or create a new document template. New templates must be stored in the Forms folder in order to be used for every new document. The Forms folder isn’t usually visible in standard view, but if you change to Explorer View, you will be able to see the Forms folder.

---

**Try This Yourself:**

1. **Open File**
   - Before starting this exercise you MUST open the document library
2. **Create a New document from the document library**
3. **Change the Font to Britannic Bold, size 14pts**
4. **From the Save As dialog box, ensure that the *Forms* Folder is the location and the file type is a document template, then click Save and close the template**
5. **Now you need to allocate the new template as the document library template.**
   - Within the document library, click the **Settings** menu, then select **Document Library Settings**
6. **Under the General Settings group, click Advanced Settings**
7. **In the Template URL: change the name of the existing template to the name of the new template and click [OK]**
8. **In the document library, click the New button to check that the new template is being used.**

---

**For Your Reference...**

To change the document template:

1. Create a new template in a program that is compatible with SharePoint
2. Save the new template in the Forms folder of the document library
3. In the document library click **Settings**, then **Document Library Settings**
OVERRIDE CHECK OUT

On occasion, you may find that a user has a document checked out and you need to access and edit the document urgently. If you have sufficient permission, you can override the check out and check the document back in. The only drawback is that the user who originally checked out the document, may not have saved all their changes and may lose some of their work.

Try This Yourself:

1. Locate the file that has been checked out by another user
2. Click the Edit button for the file and click Check In
3. Enter appropriate comments and click [OK]
4. SharePoint will display a message warning that another user has the document checked out and would you like to override this check out
   Click [OK]
5. The document is checked in and can now be accessed and edited by other users

For Your Reference...

To override check out:
1. Click the Edit button for the checked out file
2. Click Check In
3. Enter version comments and click [OK]
4. When prompted to override the check out, click [OK]

Handy to Know...

- It is good practice to let the other user know that you have had to override the check out so that they can check whether their changes are still part of the document.
CREATE A DOCUMENT LIBRARY VIEW

Creating extra views for a document library will allow users to quickly change how the items are listed by simply selecting the view. This removes the need to continually sort and filter items in order to see a particular set of files. It can also be useful to new users who haven’t yet mastered the sorting and filtering tools.

Try This Yourself:

Before starting this exercise you MUST open the default document library

1. From the Settings menu, click Create View
2. Click Standard View
3. Enter the appropriate information for each of the settings for the View:
   - Name
   - Audience
   - Columns
   - Sort (Optional)
   - Filter (Optional)
   - Group By (Optional)
   - Totals (Optional)
   - Style (Optional)
   - Folders (Optional)
   - Item Limit (Optional)
   - Mobile (Optional)

4. Enter the details of the new view as shown
   - Name = Create a Public View
   - Columns = Type = 1, Name = 2, Checked Out To = 3, Created = 4, Created By = 5, Version = 6
   - Sort = First Sort by Column
   - Totals = Checked Out To = Count, Created = Count
   - Style = Shaded

5. The new view is automatically applied to the document library

For Your Reference…

To create a document library view:
1. Within the document library, click the Settings menu and then click Create View
2. Select the required View
3. Enter the View information and click [OK]

Handy to Know…

- It is possible to create multiple views within a document library, but some of the view types may not be appropriate to use with a document library.
- Custom views can also be created in other SharePoint elements
Document Workflow is designed to assist with the development of a document that may require input from multiple users. There are various types of workflow which controls how the document is treated and generally involves users approving or rejecting the document.

In a document library, the workflow options are usually created automatically, but it is possible to change the workflow and even create your own workflow.

In this session you will:
- learn how the Workflow process works
- learn how to access the Workflow Settings for a Document Library
- gain an overview of the available settings for workflow progress
- learn how to add workflow to a document.
**WHAT IS WORKFLOW?**

By adding workflow to a document, it is almost like creating a list of tasks for the document. The tasks involve routing the document to various users who will then need to approve or reject the document. Throughout the life of the workflow, the workflow owner, usually the author, will be able to monitor the progress and status of the workflow.

---

**Workflow Lifecycle**

---

**Example**

Let’s say that an organisation is preparing a proposal for a project which requires input from the Human Resources Team, Finance Department, and the Sales Team.

1. The Project Manager will create the first draft of the proposal in the document library and then add Workflow to it.
2. Each team will then be allocated a task via e-mail to take part
3. The proposal is routed to the Human Resources Team first
4. Human Resources will then approve or reject the proposal
5. Project Manager will be notified that this task is complete via the Task List
6. The proposal will then be routed to the Finance Department who will approve or reject the proposal
7. The task is updated as complete in the Task List
8. The proposal will then be routed to the Sales Team who will approve or reject the proposal
9. The task is updated as complete in the Task List
10. The Workflow process ends and Project Manager receives an e-mail advising that the Workflow is complete
**Document Library Workflow Settings**

The default workflow type allocated to a document library is **Approval**. This is where a document is routed to users for approval or rejection. The other types are: **Collect Feedback**, which routes a document for review, **Collect Signatures**, which gathers signatures needed to complete a document, and **Disposition Approval**, which manages document expiration and retention.

**To add Document Library Workflow**

1. From the document library, click the **Settings** menu and then select **Document Library Settings**
2. Click **Workflow settings** from the **Permissions and Management** group
3. Enter the appropriate settings and click **Next** to move to the page for the progress settings
4. Click **[OK]** on the Workflow Progress page to accept all the defaults

*Note: Workflow Progress is covered on the next page*
**DOCUMENT LIBRARY WORKFLOW PROGRESS**

Setting the workflow for a document library also involves customizing how the progress of the workflow is dealt with.

To access the Workflow settings:

1. From the document library, click the Settings menu and then select Document Library Settings.
2. Click the Workflow Settings from the Permissions and Management group.
3. Enter the details of the workflow and then click Next.
4. Choose the settings for the progress and then click [OK].

Tips:
- Only add users to the Approvers list if these users can approve all documents in a document library.
- Specifying the number of days each person has to complete their task will give them an automatic reminder.
USING DOCUMENT WORKFLOW

Adding workflow to a document can be particularly useful if you need input from multiple users. By adding the Approval workflow, it will allow the document to be routed to each user one by one, who will then decide to approve or reject the document. Once all users have completed their tasks, the workflow becomes complete.

Try This Yourself:

1. Open File
   - Before starting this exercise you MUST open the default document library

2. Locate the file that requires workflow, click the Edit button and select Workflows

3. In the Workflows page, click Approval

4. Select or Enter the Approvers and enter the amount of time allocated to each user to finish their task

5. Click Start

   The approval workflow has now started. The first user will receive an email message asking them to approve the document and the timescale allocated. The email will also contain hyperlinks to allow the user to open the document directly from the email message

5. When the first user in the workflow cycle visits the Document Center within SharePoint, a notification of Upcoming Tasks is displayed.

For Your Reference...

To start document workflow:
1. Click the Edit button for the required file
2. Click Workflows
3. Click Approval
4. Enter the Approvers and the Timescale
5. Click Start

Handy to Know...

- When a document has workflow, the progress can be checked at any time. Locate the document within the library and click In Progress from the Approval column. This will allow you to see the Workflow History.
NOTES:
Wikiwiki means quick in Hawaiian. A wiki library is designed for multiple users to edit and contribute to the page content quickly and easily.

Links to existing pages can be created in a wiki library and you can also create new pages.

Wiki libraries are low maintenance and easy way to record information.

As the pages are HTML and contain links as well as text, it's almost like a mini web site within the Team Site.

**In this session you will:**
- learn how to edit a wiki page
- learn how to create a link from one wiki page to another
- learn how to create a new wiki page
- learn how to work with page versions and display incoming links.
EDIT A WIKI PAGE

Once a wiki library has been created, any user who has permission can edit the page. On the pages you can insert paragraphs of text, tables and even pictures. A wiki page works in a similar manner to a basic word processing application. With all well designed web pages, it is a good idea to keep pages short and try to use plain English.

Try This Yourself:

1. Before starting this exercise you MUST open a wiki page library
2. Within the wiki library, click the Edit button at the top of the page
3. Enter the information on the page, Use the formatting tools provided to enhance the appearance of the information
4. Click [OK]

The information is displayed on the page, just as you entered it.

For Your Reference...

To edit a Wiki Page:
1. Within the wiki library, click the Edit button
2. Enter the information
3. Click [OK]

Handy to Know...
- Using the formatting tools, you can modify the appearance of text and if you have experience of writing HTML code, you can also enter information directly into the page code.
CREATE LINKS TO A PAGE

On a wiki page, you can create links to other pages within SharePoint. This can be particularly useful especially if related information is already stored within the wiki page library. By creating a link to where the information is stored, it means there is no duplication of information, just a different method of accessing it.

Try This Yourself:

1. **Open File**
   Before starting this exercise you MUST open a wiki page library

2. **Click the Edit button at the top of the Wiki Page**

3. **Type the name of the page which needs to be linked in double square brackets, e.g. [[How To Use This Wiki Library]]**
   This is one of the default pages created by SharePoint when you create a Wiki Page Library. By surrounding the page name in double square brackets, you are creating a link to this page

4. **Click [OK]**

5. **The linked page name is displayed in blue and when you hover the mouse over link, the text changes to black and underlined and the mouse pointer changes to the pointing hand icon**

6. **Click the link to test it**

For Your Reference...

To create a link to a page:
1. Within the Wiki Page, click **Edit**
2. Type the name of the page to be linked in double square brackets, e.g. [[How To Use This Wiki Library]]
3. Click **[OK]**

Handy to Know...

- You can also create links to other areas of SharePoint, such as a list or other library. Whilst editing the Wiki page, simply click the **Hyperlink** button on the editing toolbar, enter the text to display and enter the full URL of the destination area.
CREATE A NEW WIKI PAGE

There are two ways of creating a new wiki page. First method, you can create a link to the new page without creating it first. When you click on the link, SharePoint will then create the page for you. Alternatively, you can display all the pages within the wiki page library and then use the New menu to create a new page. Either way, they new page will be created within the wiki page library.

For Your Reference...
To create a new wiki page:
1. Within the Wiki Page Library, click View All Pages from the Recent Changes section
2. From the New menu, click New Wiki Page
3. Enter the information and then click Create

For Your Reference...
To create a new Wiki Page:
1. Open the Home Page of the wiki library and click Edit
2. Create a link to the page and click [OK]
3. Click the link from the Home page to create the new page

Try This Yourself:

**Open File**

Before starting this exercise you MUST open a wiki page library

1. From the Recent Changes section in the Quick Launch Bar, click View All Pages
2. From the New menu, click New Wiki Page
3. Enter the information onto the page and then click Create
4. Open the Home page of the wiki page library and click Edit
5. Enter the text as shown and click [OK]
6. Enter the information onto the page and then click [OK]
Wiki Page Maintenance

Just like document libraries, wiki page libraries also create versions of pages when they are updated. You can view the history of the page and even restore earlier versions of the page if necessary. You can also check which pages link to the current page, this helps with navigation. A wiki page library works a bit like a mini web site, so it is useful to ensure there are links to all the pages.

Try This Yourself:

1. Open File
   Before starting this exercise you MUST open a wiki page library

2. In this example we will check the history and versions of the Home Page in the wiki page library.
   Within the Home Page, click the History button at the top of the page
   Deleted information is shaded grey and added information is shaded yellow.

3. Wiki page versions are displayed to the left of the page. Click a version to display it.

4. To use an older version of the page, simply click Restore this version.
   If the version is no longer needed, click Delete this version

5. It is useful to see how the navigation works within the wiki page library, so you can check incoming links on each page
   Return to the Home page and click Incoming Links

For Your Reference...
To check the history of Wiki Pages:
1. Within the Wiki Page Library, click the History button at the top of the page
2. Select a version and choose to Delete this Version or Restore this version
3. To check page navigation, click Incoming Links at the top of the page

Handy to Know...
- In order to assist the users to navigate around the Wiki Page Library, it is a good idea to include a link back to the Home Page on every page.
In this session you will:

- learn how to upload a picture to a picture library
- learn how to upload more than one picture at once to a library
- learn how to display images using different views
- learn how to use the editing tools within MS Office Picture Manager
- learn how to delete a picture from a library and send to the recycle bin
- learn how to download pictures to your computer and send images to other recipients.

It is possible to store pictures in an ordinary document library, but a Picture Library is specifically designed to deal with images.

A picture library can be used to store images such as company logos or staff photos, but one of the benefits of using a picture library is that you can view the pictures stored as a slide show. You can also quickly and easily download the pictures to your local computer.
UPLOAD A PICTURE TO A LIBRARY

It is not possible to create new pictures within SharePoint so all the files stored in this type of library are usually uploaded.

By uploading a file, in effect you are creating a copy of it and storing it in the SharePoint site. This does not affect the original image.

Try This Yourself:

Open File

1. From the Upload menu, click Upload Picture

2. In the upload page, click [Browse]

3. Navigate to the image file and open it.

SharePoint will insert the image file path into the Name box

4. Click [OK]

The picture is now listed in the picture library

For Your Reference…

To upload a picture to a picture library:
1. Within the Picture Library, click the Upload menu and then select Upload Picture
2. Click [Browse] to Navigate to the image file and click Open
3. Click [OK]

Handy to Know…

• If you have a few images which need uploading, it is possible to upload multiple files
UPLOAD MULTIPLE PICTURES TO A LIBRARY

In order to save time, you can upload more than one picture file at once, but the files will need to be stored in the same folder on your computer or shared network area.

SharePoint will try to use a compatible program such as Microsoft Office Picture Manager to coordinate the upload of multiple files.

Try This Yourself:

1. Open File

   Before starting this exercise you MUST open a picture library

2. From the Upload menu, select Upload Multiple Pictures

   This will launch the Microsoft Office Picture Manager (but only if the software is installed on your computer)

3. The Picture Shortcuts pane will try to locate pictures on your PC and generally navigates straight to the Pictures folder in your Documents

4. If the pictures are stored elsewhere, in this case a USB Flash Drive, click Add Picture Shortcut… within the Picture Shortcuts pane

5. Navigate to the correct location, in this example, the Removable Disk (K)

6. Select the folder that contains the pictures and click Add

7. In the Picture Shortcuts pane, select the added shortcut

8. From the list of Pictures, select the pictures to be uploaded and then click Upload and Close

For Your Reference…

To upload multiple pictures:
1. Within the Picture Library, from the Upload menu, select Upload Multiple Pictures
2. In the MS Office Picture Manager, click Add Picture Shortcut
3. Navigate to the folder and click Add

For Your Reference…

4. Within the Picture Shortcuts page, select the newly added shortcut
5. Select the required pictures and then click Upload and Close
VIEWING PICTURES IN A LIBRARY

After you have uploaded pictures into your picture library, you can change how the pictures are viewed. By displaying the pictures in a different manner it can help you locate the image that you need. There are a few different views available and they include Details, Thumbnail, Filmstrip and Slide Show Views.

Changing the View

The various views (except Slide Show) are accessed through the View option.

1. Within the picture library, click All Pictures, then point to All Pictures and click the required view (Details, Thumbnails, Filmstrip)

Details

The images are listed in the same manner as Office documents and are sorted by name. If a picture is selected, SharePoint displays a small preview below the Quick Launch Toolbar.

<table>
<thead>
<tr>
<th>Type</th>
<th>Name</th>
<th>Picture Size</th>
<th>File Size</th>
</tr>
</thead>
<tbody>
<tr>
<td>📷</td>
<td>630_1.jpg</td>
<td>2561 x 1922</td>
<td>552 KB</td>
</tr>
<tr>
<td>📷</td>
<td>630_2.jpg</td>
<td>2561 x 1922</td>
<td>570 KB</td>
</tr>
<tr>
<td>📷</td>
<td>630_3.jpg</td>
<td>2561 x 1405</td>
<td>244 KB</td>
</tr>
</tbody>
</table>

Thumbnails

Thumbnails are miniature representations of the images so you have an idea of what the image looks like, but it may not be particularly clear.

Filmstrip

This view displays the images as miniatures with a large image of the selected file.

Slide Show

This view displays each image one by one in a separate slide show view window and provides navigation buttons to move between the images.

1. From the Actions menu, click View Slide Show
EDIT A PICTURE IN A LIBRARY

The Microsoft Office Picture Manager is automatically initiated when you try to edit a picture within SharePoint. This program has a few handy tools for enhancing an image, such as removing red eye, adjusting the brightness and colour, or rotating an image. For more sophisticated image manipulation, you would be better using a different application.

To Edit a Picture:
1. Open the appropriate picture library
2. From the Actions menu, select Edit
3. Use the tools within Microsoft Office Picture Manager to edit the image
4. Click Save and Close to Save the changes and return to SharePoint

Microsoft Office Picture Manager

In order to display the picture editing tools, simply click from the Formatting toolbar. The Task Pane changes to display the tools.

<table>
<thead>
<tr>
<th>Tool</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Autocorrect</td>
<td>Adjusts the color and brightness automatically</td>
</tr>
</tbody>
</table>
| Brightness and Contrast | Use the slide scales to increase or decrease the brightness and contrast.  
**A very light or dark image can look distorted when changing the brightness or contrast, but this feature also includes slide scales for changing the Midtone, Highlight and Shadows of an image which can result in a better finish.** |
| Color              | Use the slide scales to increase or decrease the Amount, Hue and Saturation. By decreasing the saturation, you will turn the image to black and white.  
To make an image “warmer”, select red in the Hue slider and then use the amount slider to increase the amount of red in the image. |
| Crop               | Drag the crop handles around the image to remove the unwanted area and click OK.                                                              |
| Rotate and Flip    | Use the Rotate buttons to rotate the image in 90° increments. Use the Flip buttons to flip the image horizontally or vertically by 180°. Use the degree box to rotate the image by a specified angle. |
| Red Eye Removal    | Click all the red eyes that you want to fix in the image and then click OK.                                                                     |
| Resize             | Select or enter the new picture dimensions (in pixels) or specify a percentage of the original size.                                           |
| Compress Pictures  | Makes the file size smaller for faster loading and you can choose which type of compression, Documents, Web Pages or E-Mail.                |
DELETE A PICTURE FROM A LIBRARY

As with all efficient filing systems, it is good practice to regularly move or deleted unwanted or unused images.

Deleting a picture from a library does not permanently delete the image; it is placed in the SharePoint Recycle Bin. Once the Recycle Bin is emptied, the picture is deleted permanently.

Try This Yourself:

Before starting this exercise you MUST open a picture library

1. Select the required file(s) by clicking the selection checkbox until it is displayed with a tick
2. From the Actions menu, click Delete
3. When prompted to send the item to the Recycle Bin, click [OK]

For Your Reference...

To delete a picture from a Library:
   1. Select the required file
   2. From the Actions menu, click Delete
   3. Click [OK] to send the item to the Recycle Bin

Handy to Know...

- You can delete multiple items by clicking the checkbox of all the images you want to delete, and then click the Delete command from the Actions menu.
- If you accidentally delete an image, it can be restored from within the Recycle Bin
DOWNLOADING AND SENDING PICTURES

Pictures stored in a library can be downloaded to your computer so that you can use them in applications that are not compatible with SharePoint.

You can also send images from a picture library to other users who do not have access the picture library by sending them via email.

Try This Yourself:

Before starting this exercise you MUST open a picture library

1. First, let’s try downloading a file to your computer. Select the required pictures by clicking the selection checkbox until it appears with a tick.

2. From the Actions menu, click Download.

3. In the download page, select a size then click Download.

4. Select a location where the downloaded picture should be stored and click Save.

Now you will send a picture via email message

5. Select the required picture and from the Actions menu, click Send To.

6. In the Send Pictures dialog box, click Microsoft Office Outlook Message.

7. Click Options and choose Attached to the message, then click OK.

8. Click Send.

A new email message is created with the picture inserted as an attachment

9. Address and send the email message in the normal manner.

For Your Reference…

To download pictures to your computer:

1. Select the required pictures from the Picture Library.
2. From the Actions menu, click Download.
3. Select a size and then click Download.
4. Select a destination location and click Save.

For Your Reference…

To email a picture to another user:

1. Select the required pictures.
2. From the Actions menu, click Send To.
3. Click Microsoft Office Outlook Message.
4. Click Options and choose Attached…
5. Click OK and then Send.
Using a PowerPoint presentation to communicate information can be extremely effective, and many organisations usually like to include their logo on the slides or use corporate colours in their designs.

By uploading these custom slides to a *Slide Library*, it means that other users within the organisation can reuse these slides without having to create and store a template locally.

**In this session you will:**
- learn how to upload slides from existing PowerPoint presentations into a slide library
- learn how to delete unwanted slides from a slide library
- learn how to use a slide from a slide library in a presentation
- learn how to change a slide that resides in a slide library.
**PUBLISH SLIDES FROM PowerPoint PRESENTATIONS**

The process of publishing slides from existing PowerPoint presentations is done by uploading slides to the slide library.

Once uploaded, users will be able to copy and use the selected slide in their own presentations.

---

**Try This Yourself:**

1. **Open File**
   - Before starting this exercise you MUST open a slide library

2. **From the Upload menu, click Publish Slides**

3. **Navigate to the appropriate presentation and click Open**

4. **Select the required slides by ticking the checkbox next to each slide, then click Publish**

The slides are now listed within the Slide Library

---

**For Your Reference...**

To publish existing slides from PowerPoint:

1. **Open** the appropriate Slide Library
2. **From the Upload menu, click Publish Slides**
3. **Select** the required slides and click Publish

---

**Handy to Know...**

- If you want to publish all the slides within the presentation, simply click **Select All** within the Publish Slides dialog box.
DELETE SLIDES FROM A SLIDE LIBRARY

Slides which are no longer required can be deleted. When you delete a slide it is actually sent to the SharePoint Recycle Bin where it will be stored until the Recycle Bin is emptied.

Try This Yourself:

Before starting this exercise you MUST open a slide library

1. Click the selection checkbox for the slide which is to be deleted
2. From the Actions menu, click Delete Slides
3. When prompted to send the item to the Recycle Bin, click OK

For Your Reference…

To delete slides from a Slide Library:

1. Open the Slide Library
2. Click the Selection Checkbox for each slide which is to be deleted
3. From the Actions menu, click Delete Slides
4. Click OK to send slides to Recycle Bin

Handy to Know…

• If slides are inadvertently deleted, you can restore them to their original location from within the Recycle Bin
USE A SLIDE IN A PRESENTATION

The slides that reside in a slide library can be used in new or existing presentations. This can be useful if your organisation has a custom PowerPoint template that you need to use for every new presentation. Your organisation may also need to communicate information throughout the whole community, and by using the same presentation, everybody gets the same message.

Try This Yourself:

1. **Open File**
   - Before starting this exercise you MUST open a slide library
2. **Click the selection check box**
   - for the slides which you wish to reuse
3. **Click Copy Slide to Presentation**
4. **Select where the slides should be copied to**: either a new presentation or an existing presentation which must be open
5. **To keep the original slide design**, click **Keep the source presentation format**, otherwise the slide will be inserted using the destination presentation styles
6. **Click OK**

Tip: By selecting **Tell me when this slide changes** in the Copy slides to PowerPoint dialog box, you are associating the slide with the original slide in the slide library.

This means that the next time you open the presentation, PowerPoint informs you of the association and allows you to check for any updates.

If the slide in the library has changed, PowerPoint will give you the option of replacing the old version of the slide with the new one, or appending the new version of the slide to the presentation.

For Your Reference...

To use a slide in a presentation:
1. Display the Slide Library
2. **Select** the slide(s) you wish to use
3. Click **Copy Slide to Presentation**
4. Select a destination for the slide(s) and click **OK**

Handy to Know...

- If you want to prevent PowerPoint from checking for slide updates, click **Disable** when presented with the Check Slide Updates dialog box.
EDIT A SLIDE

On occasion, you may need to change the content or the design of a slide in a slide library. When editing a slide, the authoring application will open automatically, which is usually Microsoft PowerPoint. You can then use your skills in PowerPoint to amend the slide accordingly.

Try This Yourself:

Before starting this exercise you MUST open a slide library

1. Click the Edit button on the name of the slide that you wish to edit and click Edit in Microsoft Office PowerPoint

   Remember, if versions are enabled within the Slide Library, you may need to check out the slide before being able to Edit it

2. The Slide is opened within Microsoft PowerPoint

   Make the necessary amendments and then save and close the slide

   If versioning is enabled in the Slide Library, you may need to add version comments and then check in the slide

For Your Reference...

To edit a slide in a Slide Library:
1. Display the Slide Library
2. Click the Edit button to the right of the slide name
3. Click Edit in Microsoft Office PowerPoint
4. Make the changes to the slide then Save and Close the slide

Handy to Know...

• If versioning has been enabled on the slide library, you will be able to check the slide history in the same manner you would view a document version history.
Microsoft Word 2007 is very compatible with SharePoint as you have seen when working with document libraries.

You can even use Word to create new documents or edit existing documents without having to access the SharePoint Site first. You will find that you need to enter your username and password at some point in order to work with files in the SharePoint document libraries.

In this session you will:

- learn how to open a SharePoint document from within Word 2007
- learn how to save a document from within Word 2007 to a SharePoint document library
- gain an overview of a Document Workspace
- learn how to create a document workspace from within Word 2007
OPEN A SHAREPOINT DOCUMENT FROM WORD 2007

When you open a file within Word, the default folders and files displayed in the open dialog box are usually your local files, i.e. the folders which are stored on your computer. You may also be able to see network files if you have mapped drive to the network. What you don’t normally see are your SharePoint files, but you can still open them from within Word.

To Open a Recent File:

Word stores a list of files recently opened which saves time if you need to re-open the file to edit it. The recent files list is accessed through the Office button. Click the name of the file you wish to open.

To Open a File from a SharePoint Site:

When you open a file from a folder on your computer or your network, you actually navigate to the folder first. With a SharePoint file you just need to enter the full URL (web address) of the Document Library in the open dialog box.

1. From the Office menu, click Open
2. Enter the URL of the file you wish to work with in the File name box
3. Click Open

Note: If you know the name of the file as well as the name of the document library, you can include the file name to navigate straight to that particular document.
**SAVE A DOCUMENT TO A DOCUMENT LIBRARY**

When you have created a Word 2007 file you can save it into a SharePoint document library without opening SharePoint. When you save a document to SharePoint you may be prompted for your username and password as you are connecting to the internet site.

To Save a Document to a SharePoint Document Library:

1. Create the **Word** document in the normal manner
2. From the **Office** menu, click **Save As**
3. Enter the **URL** for the **Document Library** and press **Enter** (*This will navigate to the document library within SharePoint*)

4. Enter a **name** for the file and click **Save**
5. If Check in and Check Out has been enabled on the Document Library, you may need to check in the Document
There may be a time when there is much work to do in developing a document. It may be a project plan that needs input from multiple users. It may also require various tasks to be completed at different stages throughout the lifecycle of the document and it is useful to be able to keep the document versions, tasks, and other items all in one place.

What is a Document Workspace?

A Document Workspace is an area within the Team Site that is created in order to work on a specific document and looks just like a mini web site of data.

The Workspace can be used to store information which will help you to develop the document. When you create a document workspace, SharePoint create these elements by default and places the original document in a document library in the Workspace:

- **Document Library** to contain related information such as letters, reports, spreadsheets, images, presentations
- **Announcements** so that you can keep the users involved informed of any important news
- **Task List** to show the To-Do items for the document
- **Members List** will show you who has been invited to work on the document
- **Links List** which can contain useful web addresses for further resources.

These elements work in exactly the same way as the document libraries and announcements etc that you find on the team site and you can add appropriate items to the lists.

The document workspace is to be able to keep together all the information that you need to complete the document in one central location and can be used to track and monitor the progress of the document.

How does it work?

You can create a document workspace from a new document that you create in Word 2007 or from an existing document within a document library. Either way, you become the owner of the document and the workspace and you can coordinate the development by adding users to the workspace.

If there are many users who need to contribute to the document content, you can save a local copy to work on. SharePoint will periodically prompt you to update the file and if there are any conflicts due to other users updating the information, you can choose which changes to keep.

**Sample Document Workspace**

![Sample Document Workspace](image)
CREATE A DOCUMENT WORKSPACE IN WORD 2007

If you create a new document within Word 2007 and then realise that it needs to be stored in a document workspace in your SharePoint Team Site, you do not need to open the SharePoint Team Site, you can use Word directly to create document workspace. You will also be able to use the document management panel to see the items within the document workspace.

To create a Document Workspace in Word 2007:

1. Create the new document within Word 2007 and add the appropriate information
2. Save the document on your local computer in the normal manner
   By saving a local copy of the file you will be able to work on the file and then send an updated version to the document workspace when ready
3. From the Office menu, point to Publish and then click Create Document Workspace
4. In the Document Management Panel enter a name for the workspace and select the location of the workspace (This example shows the document workspace will be created in the Document Center of the SharePoint Site)
   Note: If the location has not been used before, you may need to type the URL of the workspace location
5. Click Create
DOCUMENT MANAGEMENT PANEL

When using Microsoft Word 2007, the Document Management Panel is automatically displayed when you open a file that has a document workspace. The panel contains tools to help you view, add and edit all the related information such as tasks, documents and links etc that are located in the document workspace.

To use the Document Management Panel:


   - Click **Open site in browser** to display the full document workspace within SharePoint.
   - This option displays the status of the current document. If workflow has not been initiated then there will not be any document status.
   - This option displays the members of the document workspace.
   - This option displays all the tasks that are within the document workspace.
   - This option displays a list of the document within the workspace document library.
   - This option displays a list of the links within the links list within the document workspace.

To add items to the Document Workspace:

Items such as tasks, links and documents can easily be added to the document workspace through Word 2007.

1. Click the option you want to use, e.g. Members.
2. At the bottom of the Document Management Panel, click Add new members/Add new task.
3. Work through the wizard to add the item.

To Get Updates:

When you add new items to a document workspace, you can see them immediately in the document management panel. If there are many members working in a document workspace, they may also be adding items such as tasks that you can’t yet see. By clicking **Get Updates** at the bottom of the panel, any new or changed items will appear in your document management panel so you can see what work other users are contributing.
Microsoft Excel 2007 has excellent tools for manipulating and analysing data and is compatible with SharePoint. Lists in SharePoint can become extensive and Excel can be used to analyse the information more efficiently. You can also link data between SharePoint and Excel.

In this session you will:

- learn how to export list information to Excel 2007
- learn how to use sorting and filtering in an Excel 2007 table
- learn how to use the links in an Excel spreadsheet.
**EXPORT A LIST TO EXCEL 2007**

Excel 2007 has very powerful analysis tools such as multiple column sort and advanced filtering. Whilst document libraries within SharePoint also have sorting and filtering tools, they do not have as many options as Excel 2007. By exporting list information to Excel 2007, you will find that you can manipulate and analyse the data more efficiently.

**To export a list to Excel 2007:**

The process of exporting a list to Excel 2007 is the same regardless of which type of list. The example used here is exporting a document library to Excel 2007.

1. Open the appropriate list
2. From the Actions menu, click Export to Spreadsheet
3. Click Open when prompted

4. If the Microsoft Office Excel Security Notice is displayed, click Enable

5. In the Import Data dialog box, select Table, select New workbook and then click OK

A table will ensure the information is imported in column and row format with the table tools enabled.

Excel creates an Excel Web Query File with the temporary name owssvr.iqy. If you wish to keep the workbook, remember to save it with a different name.
Once the information has been exported to Excel, the data is automatically formatted as a table. The table is formatted to make the data easier to read and it also displays drop down arrows at the top of each column. The drop down arrows allows you to sort and filter the data to suit your needs.

Table Tools in Excel 2007

To sort data in an Excel 2007 table:

Using the drop down arrow you will be able to perform a quick sort of the data.

1. Locate the column that you want to sort the data by
2. Click the drop down arrow on the column and click Sort A to Z

![Drop down arrow]

To identify which column has been sorted, Excel displays an arrow. An upward pointing arrow indicates that the data is sorted in ascending order and a downward pointing arrow indicates that the data is sorted in descending order.

To filter data in an Excel 2007 table:

Filtering data allows you to display information that meets specified criteria.

1. Locate the column that you want to filter
2. Click the drop down arrow on the column
3. Select the required criteria by ticking the checkboxes
4. Click OK

Note: To remove the filter you can either Select All or click Clear Filter From…
LINKING LISTS

When list information is exported to Excel 2007, a link is automatically created between the Excel file and the SharePoint list. This means that the Excel spreadsheet can be refreshed so that it includes any changes made to the SharePoint list. When working with document library information, Excel creates a hyperlink to the original document so that it can be opened from Excel.

To use a link in Excel 2007:

If you have exported information from a document library to Excel 2007 then an automatic link is created from the file name and appears like a hyperlink on a web page, i.e. blue text with an underline.

1. Click the name of the file in the spreadsheet

2. When prompted to open the file, click OK

3. Work on the file as normal

Note: If the Document Library has check in/check out enabled, you may be required to check out the file before updating the content.

To refresh an Excel 2007 list:

The information in a SharePoint list can change on a regular basis. In order to ensure the details in the Excel file are up to date, you will need to frequently Refresh the spreadsheet.

1. Open the Excel file that is linked to the SharePoint list
2. From the Table Tools Design tab, locate the group called External Table Data
3. Click Refresh

Note: If you made changes to the Excel list, such as adding another item, you will not be able to update the SharePoint list with the changes you made in Excel. However, you can create a brand new SharePoint list using the data from Excel.
A lot of the information stored within a SharePoint site can be synchronised with Outlook 2007 on your PC. This means that you can access contact lists and task lists on your SharePoint site by using Outlook.

In this session you will:

- learn how to add a SharePoint Contact List to your Outlook 2007
- learn how to add a SharePoint calendar to Outlook 2007
- gain an overview of how to add a SharePoint task list to Outlook 2007
- gain an overview of how to work with alert notifications.
ADDING SHAREPOINT CONTACTS TO OUTLOOK

Your company may have many contacts lists within the SharePoint site and one of the advantages of synchronising the list is that you can work offline and still be able to use the SharePoint contacts. To ensure that you have the up to date information about the contacts, simply repeat the process outlined below to synchronise the data.

To add SharePoint Contacts to Outlook 2007:

1. Within SharePoint open the appropriate SharePoint contact list
2. From the Actions menu click Connect to Outlook
3. When prompted to Connect this SharePoint Contacts List to Outlook, click Yes
4. The SharePoint Contacts List can now be accessed via the Folders List in the Outlook Navigation Pane
ADD A SHAREPOINT CALENDAR TO OUTLOOK 2007

Just like contacts lists, SharePoint calendar lists can also be added to your Outlook 2007. This can be particularly useful within Outlook 2007 as you can use the overlay feature when viewing multiple calendars to see if any of the appointments in your calendar and the SharePoint calendar clash or conflict.

To add a SharePoint Calendar to Outlook 2007:

1. Open the appropriate calendar list (In this example we will be using the list called events)
2. From the Actions menu, click Connect to Outlook
3. When prompted to connect to this SharePoint Calendar, click Yes
4. The SharePoint Calendar called Events can now be accessed through the Folder List in the Outlook Navigation Pane
To add a SharePoint Task List to Outlook 2007:

5. Open the appropriate task list *(In this example we will be using the list called tasks)*
6. From the **Actions** menu, click **Connect to Outlook**

7. When prompted to **Connect this SharePoint Task List to Outlook**, click **Yes**

8. The SharePoint task list called tasks can now be accessed through the **Folder List** in the **Outlook Navigation Pane**
WORKING WITH ALERTS

An alternative method of keeping track of items within SharePoint is to use Alerts. Alerts can be set on individual items within SharePoint or an entire list and automatically generate an email message when something about the alerted item changes. When setting alerts you can also specify how often you wish to be notified of changes.

To set an Alert on an item or List:

1. Click the Edit button on a specific item (such as a document, task or event) and click Alert Me
   OR
2. Click Alert Me from the Actions menu in the entire List
3. Choose the appropriate settings for the Alert

Message Notifications:

When an alert has been successfully created, SharePoint will initiate an email message to confirm this:

You have successfully created an alert for 'Tasks'
Training Unit [donotreply@teamspace.leeds.ac.uk]
Sent: 25 May 2009 14:46
To: tutor3

Alert 'Tasks' has successfully been added on Training Unit.

You will receive alerts in e-mail. The timing and criteria for the alerts depend on the settings entered when the alert was added.

You can change this alert or any of your other alerts on the My Alerts on this Site page.

In this example, the Alert has been set for the entire task list. The example below shows the message you receive when an item has been changed in the List.

Tasks - Report
Training Unit [donotreply@teamspace.leeds.ac.uk]
Sent: 25 May 2009 15:05
To: tutor3

Training Unit
Report has been added

Modify my alert settings | View Report | View Tasks | Mobile View

Title: Report
Priority: [C] Normal
Status: Not Started
Description:
Start Date: 5/25/2009
Last Modified 5/25/2009 3:03 PM by tutor3
SharePoint essentially is a Web Site made up of web pages. As you know, SharePoint is an excellent base for storing items in lists and libraries, but you may need to create a page that includes static information.

When you create a web page you will have to store it in a library so it may be worthwhile creating a new library to contain all your basic web pages.

You can then add links on your Home Page to display these basic pages.

**In this session you will:**

- learn how to create a library to store web pages
- learn how to create a basic web page
- learn how to make changes to a basic web page
- learn how to add an image to a basic web page
- learn how to add a hyperlink to a basic web page
- learn how to create a hyperlink to a basic web page from the team site home page.
CREATE A WEB PAGE LIBRARY

Not all users will be able to create basic web pages so it may be worthwhile creating a separate library in order to store all of the web pages that you create. You could also restrict access to this library so that only users you want to allow to change the pages can do so. An ordinary document library will suffice for storing web pages.

To Create a Web Page Library:

1. From the Quick Launch Bar click View All Site Content
2. At the top of the page, click Create
3. Within the Libraries section, click Document Library
4. Enter the details for the library and click Create

Example

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 document library.

Name:
Basic Web Pages

Description:
Store all basic web pages in this library

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

Yes
No

Incoming E-Mail
Specify whether to allow items to be added to this document library through e-mail. Users can send e-mail messages directly to the document library by using the e-mail address you specify.

Allow this document library to receive e-mail?
Yes
No

E-mail address:
@teamspace.leeds.ac.uk

Document Version History
Specify whether a version is created each time you edit a file in this document library.

Create a version each time you edit a file in this document library?
Yes
No

Document Template
Select a document template to determine the default for all new files created in this document library.

Document Template:
Basic page

create Cancel
Basic web pages can contain simple text, images, hyperlinks and tables and the main reason for creating a basic web page is to display general information. Basic pages are designed to be read, there is no interaction required from the user apart from navigating to the hyperlinks if any are provided.

**CREATE A BASIC WEB PAGE**

To Create a Basic Web Page:

1. From the Quick Launch Bar click View All Site Content
2. At the top of the page, click Create
3. From the Web Pages section, click Basic Page
4. Enter a Name for the page and select the document library in which to store the page
5. Click Create

Example

6. Enter the Text onto the page using the Rich Text Editor (use the formatting tools to enhance the appearance of the page)

7. Click Save
EDIT A BASIC WEB PAGE

Whilst the information on a basic web page is generally static, you may need to update it or change it. You can use the Rich Text Editor to change the information or if you are familiar with HTML code, you can edit the code behind the page directly.

To Edit a Basic Web Page:

1. Navigate to the document library that contains the basic web page
2. Click the web page name to display the page
3. Click Edit Content at the top of the page
4. Enter or change the information using the Rich Text Editor
5. Click Save and the page will now reflect the new changes

Note: If the document library that holds the web page has versioning enabled, you may need to go through the check out and check in process when working on web pages.
ADD AN IMAGE TO A BASIC WEB PAGE

Web pages that only contain text can be a little dull to read and not very enticing for your visitors. It is therefore useful to include images on the page to illustrate the information.

If you are going to use images on your basic web pages you will need to upload a copy of the image to the same document library as the web page is stored.

To add an Image to a Basic Web Page:

1. **Open** the page that you wish to edit
2. Click **Edit Content** at the top of the page
3. In the **Rich Text Editor** position the insertion point where the image should go
4. Click the **image** button
5. Enter the **Alternative Text** *(This is the text that appears when the visitor hovers the mouse over the image. If a user has turned off images in their browser, the alternative text will display in instead)*
6. Enter the **Address** of the Image *(It is a good idea to open the image before you edit the page, this way you can then copy the URL from the browser address bar and simply paste it into the Insert Image Webpage Dialog Box)*

7. Click **OK**
8. In the **Rich Text Editor** click **Save**

The page will now include the image:
CREATE HYPERLINKS ON A BASIC WEB PAGE

Hyperlinks are an effective way of moving around a web site and a SharePoint site is no different. Adding hyperlinks to a basic web page will allow your visitors to navigate to the link destination.

Hyperlinks can be created to take the visitor to other areas of SharePoint or can even link to external web sites.

To add a Hyperlink to a Basic Web Page:

9. **Open** the page that you wish to edit

10. Click **Edit Content** at the top of the page

11. In the **Rich Text Editor** position the insertion point where the hyperlink should go

12. Click the **hyperlink** button

13. Enter the **Text to display** *(This is the text that appears on the actual page)*

14. Enter the **Address** *(If you want the hyperlink to point to a page within SharePoint, it is a good idea to open the destination page, copy the URL from the browser address bar and simply paste it into the Insert Hyperlink Webpage Dialog Box)*

15. Click **OK**

16. In the **Rich Text Editor** click **Save**

The page will now include the Hyperlink:

---

**Team Structure**

The are 25 members in the team and between us we have over 250 years experience in our field. We also have an extensive client list.
CREATE A LINK TO A BASIC WEB PAGE

Users will be able to access the library that contains all the basic web pages and open them to read them, but what if the user does not know where to find them. By creating links from the Team Site Home Page to your web pages your users and visitors will be able to see the information easily. You will only be able to edit the Home Page if you have sufficient permission.

To create a Link to a Basic Web Page

1. Navigate to the Team Site Home Page and at the top of the page click Site Actions
2. Then click Edit Page
3. Click in the Page Content area (This is the only area that you will be able to type information and it works like the Rich Text Editor)
4. Enter the hyperlink text on the page and then ensure it is selected
5. From the Editor toolbar click the Hyperlink button
6. Enter the URL of the destination page (or browse to it)
7. Enter a Tooltip if required (This is the help text that appears when the mouse is hovered over the hyperlink text) and then click OK
8. At the top of the Home Page, click Publish to upload the changes
9. The Home Page will now contain a link to a basic web page in a document library
In this session you will:

- learn how to create a web part page
- learn how to change the information in the Page Title Bar
- learn how to add a web part to a page
- learn how to add content editor web parts to a page
- learn how to modify a web part and explore the settings.

A web part is an area on a web page that can display information from elsewhere within SharePoint. A web part page contains multiple web parts.

For example, your users may frequently use documents from a document library, monitor tasks from a task list and need to be reminded of upcoming events. Rather than having to navigate to each library or list separately, you can include each list or library in a web part. The advantage is that all three elements can appear on one page, thus providing quick and easy access to them.
CREATE A WEB PART PAGE

When you create a web part page you can specify a layout for the page. This will split the page into sections so that when you add the web parts it actually looks like a well designed page.

Once the page has been created, you will need to edit it. This will allow you to choose which lists and libraries should be included on the page. The page also needs to be stored in a document library.

To create a Web Part Page:

1. Navigate to the Team Site Home Page
2. From the Quick Launch Bar, click View All Site Content
3. At the top of the page, click Create
4. From the Web Pages section, click Web Part Page
5. Enter an appropriate name for the page
6. Select a Layout Template (The layout templates control the sections of a page)
7. Select a Document Library in which to store the page and then click Create

Once the page has been created you will then need to open it and Edit the Page to start adding web parts.
MODIFY THE PAGE TITLE BAR

Once the web part page has been created it is basically a blank page with zones. The layout of the zones will depend on which layout template you choose when you create the page. The page title is usually the same as the file name but you can change these elements if you need to. You can also include a description so the users know what this particular page is intended for.

To Modify the Page Title Bar

In this example the page is called Sales Team and has been saved in the Site Collection Documents Library.

1. Open the web part page that you need to modify
2. From the Site Actions button at the top of the page, click Edit Page (The editing toolbar will display so that you know the page is being edited)
3. In the Title Bar area, click Edit Title Bar Properties
4. In the Web Part Page Title Bar Task Pane, enter a Caption and Description (The Title is the file name and the image will include SharePoint’s default web page icon. The icon image can be changed if you prefer a different image)
5. Click OK
6. Click Save and Stop Editing at the top of the page

The page now includes the Caption and Description
**ADD A WEB PART TO A PAGE**

There are many types of web parts that can be added to a page and the process is practically the same for any kind of web part. Web parts include document libraries, events, news items, task lists, surveys, and discussion boards etc. Virtually anything created within SharePoint can be included on a web part page.

**To add a Web Part to a Page:**

1. **Open** the web part page to be edited and from the **Site Actions** menu, select **Edit Page**
2. Click **Add a Web Part** in the area that you want to include a list or library
3. Select the appropriate **Web Part** *(In this example we will be adding the task list to the page)*
4. Click **Add**

*The Task List is now included in the Top Row section of the page*
CONTENT EDITOR WEB PARTS

Within a web part page you may need to include some static text such as an introduction to the page or an overview of the information stored or even instructions of how to use the page. This is where the content editor web part becomes useful as you can enter basic text, hyperlinks images and tables, just like a basic web page. The difference is that only a portion of the page is static.

To add Content Editor Web Part to a Page:

1. Open the web part page that you want to edit
2. From the Site Actions menu at the top of the page click Edit Page
3. In the appropriate section, click Add a Web Part
4. Select the Content Editor Web Part and click OK

5. Click open the tool pane within the Content Editor Web Part and then from the Content Editor Web Part task pane, click Rich Text Editor

6. Enter the information into the Rich Text Editor and click OK

7. When prompted to save the page click OK

The information typed inside the Rich Text Editor will now appear in the appropriate section.
MODIFYING WEB PARTS

When a web part is added to a web page you can modify certain elements of the web part by using the web part task pane.

The settings for a web part will differ slightly depending on the type of web part you have added.

To Modify a Web Part

1. Open the page that contains the web part that you want to modify
2. From the Site Actions menu at the top of the page click Edit Page
3. Locate the web part that need to be changed, click edit and then Modify Shared Web Part

4. Use the web part task pane to change the web part accordingly

The example below shows the settings available for the task list web part:

- Use these options to change the columns of information that are displayed
- Use these options to change the size of the web part
- Use these options to change the location of the web part
- Use these options to allow the user to minimise, close or hide this web part if they don’t need to see it
People who need to be able to use the SharePoint site first have to be given permission to get into the site.

Depending on their role within the organisation some users may need to be able to access and read certain information whereas other users may need to be able to edit and change the information.

When a SharePoint site is created there are three users groups and five permission levels created automatically.

In this session you will:

- gain an overview of the default permissions and groups provided by SharePoint
- learn how to add a user to a site
- learn how to remove a user from a group and a site
- learn how to create a new user group for setting site permissions
- learn how to display the permissions for a group
- learn how to change group settings
- learn how to add a user to a site and allocate permissions directly.
ABOUT USERS, GROUPS AND PERMISSIONS

The administrator of the SharePoint site will need to grant access to the users of the site. Individual users can be assigned their own permissions or they can belong to a group where the permissions are already allocated. The permissions range from being able to read the content only to being able to add more sites, and create pages, lists and libraries.

Permissions

There are five permission levels which are provided by SharePoint by default, but you can create further levels if required.

<table>
<thead>
<tr>
<th>Permission Level</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Full Control</td>
<td>This level allows users to do almost anything to the site. They have full control over the site settings, pages, lists, libraries and any other elements that may need to be created in the site. This level is usually assigned to the Owners group.</td>
</tr>
<tr>
<td>Design</td>
<td>This level will allow users to create lists and libraries and edit pages and is not assigned to a group by default.</td>
</tr>
<tr>
<td>Contribute</td>
<td>This level will allow users to add, edit and delete items within lists and libraries but they will not be able to amend, create or delete the lists and libraries themselves. This level is usually allocated to the Site Members group.</td>
</tr>
<tr>
<td>Read</td>
<td>This level will only allow users to read the information, they will not be able to add, edit or delete items and this level is usually assigned to the Site Visitors group.</td>
</tr>
<tr>
<td>Limited Access</td>
<td>This level will allow users access to specific items within lists or libraries but not the entire site, list or library.</td>
</tr>
</tbody>
</table>

Groups

SharePoint provides three default groups with assigned permission levels. It is possible to create your own custom groups and permissions if required.

<table>
<thead>
<tr>
<th>Group Name</th>
<th>Permission Level</th>
</tr>
</thead>
<tbody>
<tr>
<td>Site Name Owners</td>
<td>Full Control</td>
</tr>
<tr>
<td>Site Name Members</td>
<td>Contribute</td>
</tr>
<tr>
<td>Site Name Visitors</td>
<td>Read</td>
</tr>
</tbody>
</table>

If you have many users within the team that required the same permissions, you should consider creating a new group and adding the users to the group. This means that if you change the group permissions, everyone within the group will be affected.

If you have a user who requires specialist permissions, you can assign individual permissions for that particular user which are added to the permissions they hold as a group member.
**Add a User**

Before a user can access the information within SharePoint, they will need to be added as a user of the site. If the user does not need any special privileges or permissions when using the SharePoint site, then the user can be added to one of the default user groups. This means that the user will inherit all the permissions allocated to a particular group.

To add a User to a Site:

1. Navigate to the appropriate Team Site *(In this example the Team Site is called Tutors)*
2. From the Site Actions menu at the top of the page click Site Settings
3. In the Users and Permissions section click People and groups
4. From the Groups section in the Quick Launch Bar, click the group name the user should belong to *(In this example we are adding a members who will have contribute permissions)*
5. From the New menu click Add Users
6. Enter the Users names in the Users/Groups section
7. Select the required permission type *(in this example the user will become Tutors Owners [Full Control]*)
8. If you want to advise users of their new permissions, select to advise them via email and enter an appropriate message
9. Click OK
**REMOVE A USER**

Staff changes are inevitable within an organisation so it is good practice to remove users who no longer need access to the SharePoint site.

Removing a User from a site will also remove them from the group, so this process can be done all at once.

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**To remove a User from a Site**

1. Navigate to the appropriate site
2. From the Quick Launch Bar click People and Groups
3. Select the user you wish to remove by placing a tick in the check box
4. From the Actions menu click Remove Users from Group
5. When prompted to remove the user click OK
CREATE A NEW USER GROUP

As the user base of a SharePoint Site grows you may find that the default groups do not correspond with the permissions that you want to allow. The visitors group may be too restrictive whereas the owners group may not be restrictive enough. In this situation it might be worth creating a new group where you can specify the permissions that you want to allow.

To create a new Group:

1. Open the appropriate site and from the Quick Launch Bar, click People and Groups
2. From the New menu, click New Group
3. Enter the information about the new group and then click Create

Enter a name that you want the group to be known by and a short description about what the users in this group will be able to do.

This Owner of the site is usually the creator.

Select which members will be able to see and edit the group members.

Decide if you want to accept requests to join/leave the group.

Finally, choose the permission you want to assign to the group.

Choose the permission level group members get on the site: Click here to view the available options.
VIEW GROUP PERMISSIONS

Once you have set up your users and groups within your site, you may just need to check which groups have which permissions. From within the site, there is a quick and easy way for users to see the groups, but they will only be able to change them if they have sufficient permissions to do so.

To View Group Permission:
1. From the Team Site Quick Launch Bar, click People and Groups
2. Then click Site Permissions

An overview of the permissions is displayed

Permissions: Tutors

Use this page to assign permission levels to users and groups. This Web site does not allow users to take actions on content.

<table>
<thead>
<tr>
<th>New</th>
<th>Actions</th>
<th>Settings</th>
</tr>
</thead>
<tbody>
<tr>
<td>![Users/Groups]</td>
<td>![Tutor Leaders]</td>
<td>![SharePoint Group]</td>
</tr>
<tr>
<td>![Tutors Members]</td>
<td>![Tutor Leaders]</td>
<td>![SharePoint Group]</td>
</tr>
<tr>
<td>![Tutors Owners]</td>
<td>![SharePoint Group]</td>
<td></td>
</tr>
<tr>
<td>![Tutors Visitors]</td>
<td>![SharePoint Group]</td>
<td>![Tutors Visitors]</td>
</tr>
</tbody>
</table>

User Name: Tutor Leaders
Permissions: Approve

User Name: Tutors Members
Permissions: Contribute

User Name: Tutors Owners
Permissions: Full Control

User Name: Tutors Visitors
Permissions: Read
To change the Group Settings:

1. Open the appropriate site and from the Quick Launch Bar, click People and Groups
2. From the Groups Section, click the group you want to change
3. From the Settings menu, click Group Settings
4. Amend the settings accordingly and click OK
ADD A USER WITH INDIVIDUAL PERMISSIONS

In earlier versions of SharePoint every new user needed to belong to a site group in order to assume permission to perform tasks within the site. This is no longer the case as Users can be added to the site and allocated their own unique permissions.

To add a User and Set Individual Permissions:

1. Navigate to the appropriate Team Site (In this example the Team Site is called Tutors)
2. From the Site Actions menu at the top of the page click Site Settings
3. In the Users and Permissions section click People and groups
4. From the Groups section in the Quick Launch Bar, click All People
5. From the New menu click Add Users
6. Enter the User name in the Users/Groups section
7. Select Give users permission directly
8. Choose the required permission level
9. Click OK