



# SharePoint 2010

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Rollins College  
2011



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SharePoint is a cloud-based (online) file storage and collaboration tool. SharePoint allows you to share files with your coworkers, keeping track of versions and preventing users from overwriting others edits (using the Check-in, check-out function).

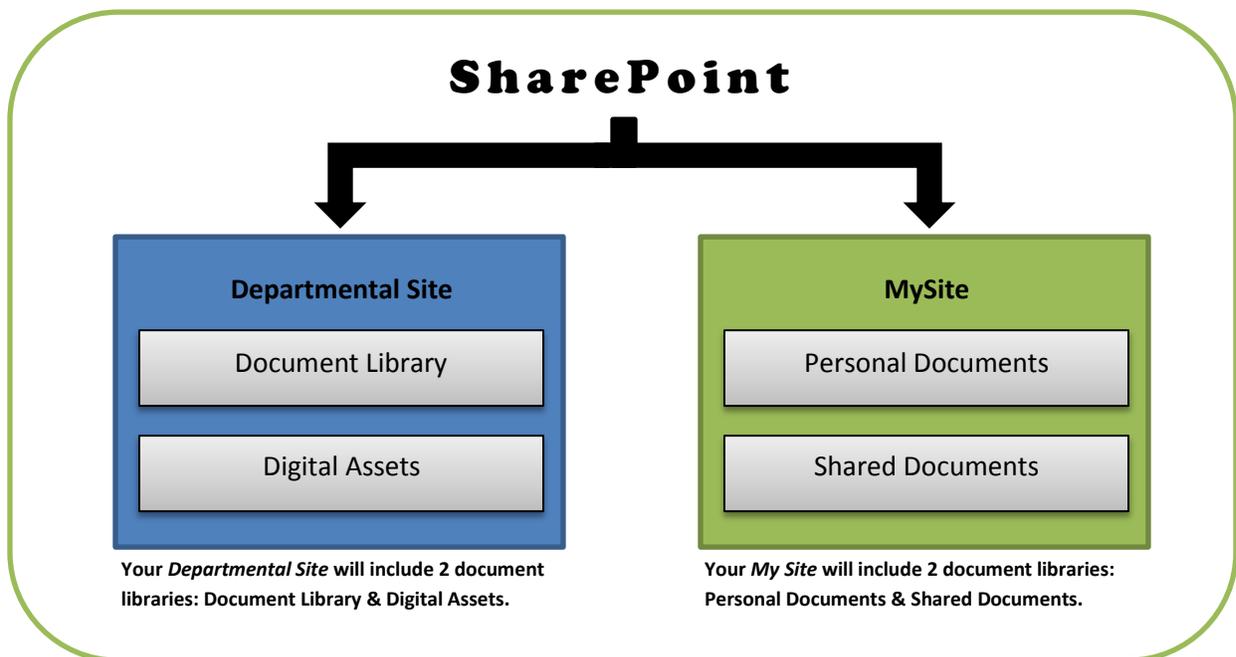
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## Overview

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SharePoint is made up of several components.

- **Departmental Site** – Your departmental site will house the shared document libraries for your department or group. You may have access to several different departmental sites depending on your role at the college.
- **Document Libraries** – The shared files for your department that formerly resided on your shared network drives (i.e. S drive) will now reside in a document library associated with your departmental site. Most departmental sites will have two document libraries by default: *Documents* and *Digital Assets*.
- **MySite** – Your MySite in SharePoint will take the place of your H drive. Your MySite files (located under My Content) are broken into two document libraries: *Shared* and *Personal*.



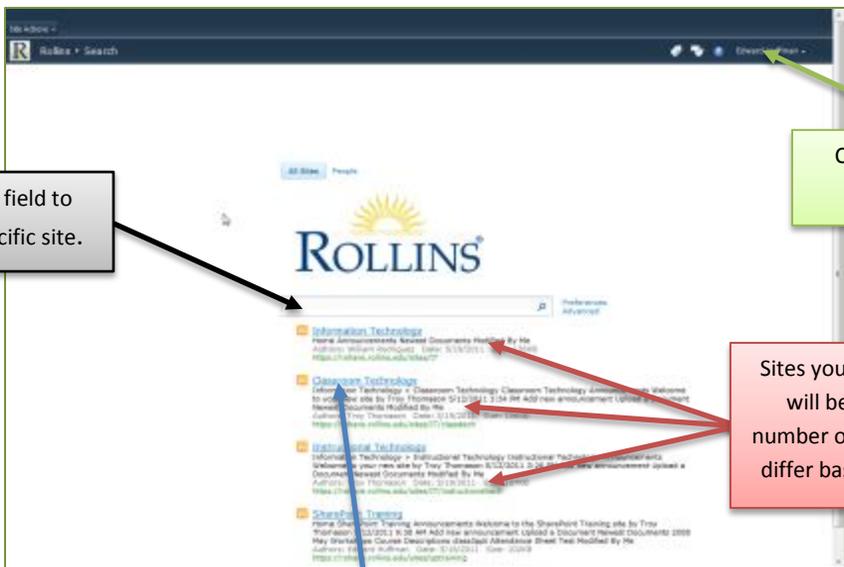
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## Accessing SharePoint

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You can access SharePoint via the Campus Logins drop-down menu on the R-Net homepage or by using the URL : <https://rshare.rollins.edu> . You will use the same credentials that you currently use for your email account.

**NOTE:** SharePoint will work in all of the major browsers; however, for PC users, it is recommended that you use Internet Explorer for maximum functionality.



The screenshot shows a web browser window displaying the SharePoint search results page. The page features the Rollins College logo at the top. Below the logo is a search bar with the text "All Sites" and "Results". A list of search results is displayed, including "Information Technology", "Classroom Technology", "Instructional Technology", and "SharePoint Training". Each result includes a title, a brief description, and a URL. Callout boxes provide instructions: a grey box points to the search bar with the text "Use the search field to search for a specific site."; a green box points to the "MySite" link in the top right corner with the text "Click here to access your MySite."; a blue box points to one of the search results with the text "Click on one of the links to access the site."; and a red box points to the list of results with the text "Sites you will have access to will be listed here. The number of sites displayed will differ based on your access."

Once you login into SharePoint, you should see a screen that resembles the one above. All of the SharePoint sites that you have access to will be listed below the search box.

## Departmental Site - User Interface

The main window for your SharePoint site gives you access all of your image and file libraries, site actions, page tools and a link to your MySite.

The screenshot shows the SharePoint user interface for a site titled "Information Technology". The interface includes a top navigation bar with "Home", "Instructional Technology", and "Classroom Technology" options. A search bar is located on the right side of the top bar. The main content area is divided into sections: "Announcements" with a "Welcome to your new site" message, "Newest Documents" listing various files like "IT Birthdays" and "RC Wireless", and a "Modified By Me" column. A left-hand navigation pane lists "Libraries" (Digital Assets, Documents, Drop Off Library, Sharepoint Project) and "Lists" (Tasks, Announcements, Phone Call Memo). A "Site Content" section is also visible, listing folders like "Announcements", "Digital Assets", "Documents", "Drop Off Library", "Images", "Pages", "Phone Call Memo", and "Resources".

Document and other file libraries will be listed here.

Use this button to navigate up one level.

Click here to access your My Site.

Announcements for your site will be listed here.

Site Content folder tree, use this to navigate your folder structure.

Any sub-sites associated with your site will be listed here.

New documents associated with your dept. site will be listed here.

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## Permissions

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There are two basic levels of permissions that most users will have: General Users and Site Administrators. These are the default permission levels. If a user does not have permission to view a document, they will receive a notification message and can request permission from the site administrator at that time.

- **General Users** – Can upload, access, and edit files in the SharePoint site.
- **Site Administrators** – Can change permissions, layouts, and views in addition to the ability to upload, access and edit files in the SharePoint site.

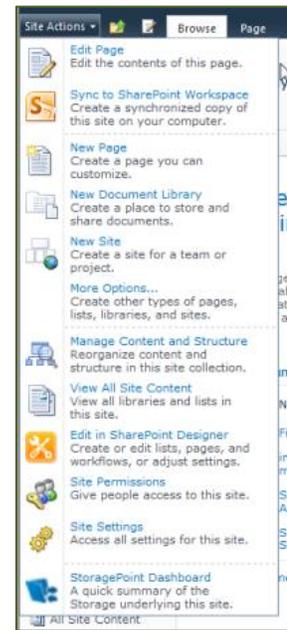
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## Site Actions: Site Administrator

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The Site Actions drop-down menu, located in the upper left hand corner of the page, provides access to a number of SharePoint functions. Some of the more common functions available to *Site Administrators* under this menu are:

- **Edit Page** – Edit page allows you to edit the current page in SharePoint. You can use this to adjust layouts etc. (*Site Administrators Only*)
- **Sync to SharePoint Workspace** – This function allows you to sync the current site with your local computer (uses SharePoint Workspaces on PCs and Microsoft Document Connection on Macs).
- **New Page** – This tool allows you to create a new page in your SharePoint site. (*Site Administrators Only*)
- **View All Site Content** – This is a very useful tool which will allow you to see all of the content associated with your SharePoint site broken into groups based on content type.
- **Site Permissions** – Site Permissions allows you to control the permissions for your site and manage any permissions requests. (*Site Administrators Only*)
- **Site Settings** – Site Settings allows you adjust the color scheme, layout and other aspects of your SharePoint site. (*Site Administrators Only*)



**NOTE:** Some **Site Actions** may not be accessible to you based on your permission levels. If you do not have the rights to perform a task or access a file you will be informed and in most instances can request the rights at that time.

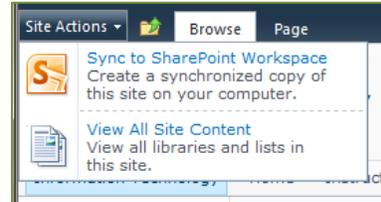
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## Site Actions: General User

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The Site Actions drop-down menu, located in the upper left hand corner of the page, provides access to a number of SharePoint functions. The functions that are available to the *General User* are:

- **Sync to SharePoint Workspace** – This function allows you to sync the current site with your local computer (uses SharePoint Workspaces on PCs and Microsoft Document Connection on Macs).
- **View All Site Content** – This is a very useful tool which will allow you to see all of the content associated with your SharePoint site broken into groups based on content type.

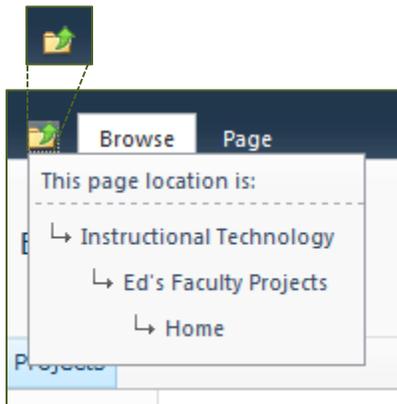


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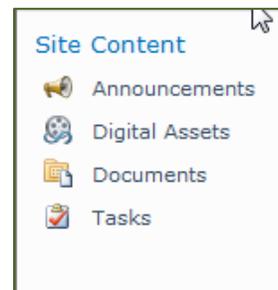
## Navigation

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There are two main ways to navigate through you SharePoint site. You can use the Site Content folder tree on the left side of the site or you can use the **Navigate Up** button.



This image shows the Navigate Up button.



This image shows the Site Content folder tree.

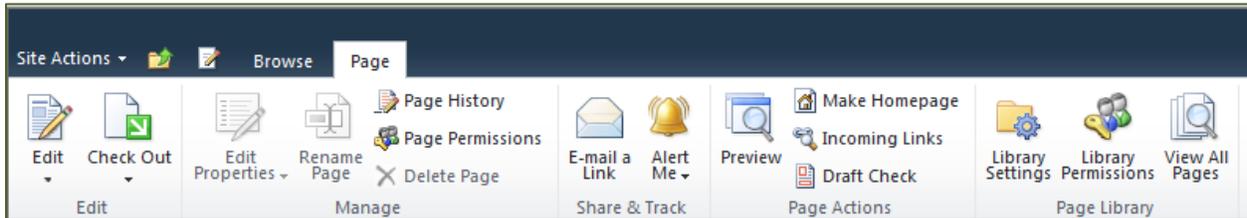
You can also access any of your content using the View All Site Content command located under the Site Actions drop-down menu. (Site Actions>View All Site Content). The All Site Content page will list all of you content grouped by type.

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## Page Tab

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The Page tab is available when you are on your in your departmental site and is replaced by the *Library Tools* tabs when you are in one of your libraries. Clicking on the Page will display a number of additional tools for making changes to your SharePoint site. If you have sufficient permissions (i.e. Site Administrator), you will be able to edit the layout, permissions and other settings for *the current page* in your SharePoint site.



**NOTE:** Some tasks/functions may not be accessible to you based on your permission levels. If you do not have the rights to perform a task or access a file you will be informed and in most instances can request the rights at that time.

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## Library Tools

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When you are in one of your Document Libraries, you will have two additional tabs available to you: Documents and Library.

### The Documents Tab

The Documents tab provides tools that allow you to upload, edit and manage your files.

The screenshot shows the 'Library Tools' ribbon with the 'Documents' tab selected. The ribbon is divided into several groups: 'New' (New Document, Upload Document, New Folder), 'Open & Check Out' (Check Out, Check In, Discard Check Out), 'Manage' (View Properties, Edit Properties), 'Share & Track' (E-mail a Link, Alert Me, Download a Copy), 'Copies' (Workflows, Publish), and 'Tags and Notes' (I Like It, Tags & Notes). Three callout boxes provide descriptions: a green box for 'New' tools, a blue box for 'Open & Check Out' tools, and an orange box for 'Manage' tools.

These tools allow you to upload documents and create a new document or folder.

The tools in this group allow you to edit and/or check in/out your files.

The Manage tools allow you to view and edit your file's properties (or metadata).

### The Library Tab

The Library tab includes tool that allow you to change how you view your library and the files it includes. This tab also offers tools that allow for integration between SharePoint and programs in the Office suite.

The screenshot shows the 'Library Tools' ribbon with the 'Library' tab selected. The ribbon is divided into several groups: 'View Format' (Standard View, Datasheet View, New Row, Create View), 'Manage Views' (Current View, All Documents, Current Page), 'Share & Track' (E-mail a Link, Alert Me, RSS Feed), 'Connect & Export' (Sync to SharePoint Workspace, Connect to Office), 'Customize Library' (Form Web Parts, Edit Library, New Quick Step), and 'Settings' (Library Settings, Library Storage). Two callout boxes provide descriptions: a red box for 'View Format' tools and a grey box for 'Connect & Export' tools.

These tools allow you to change your view, create new views and add Metadata columns to your libraries.

The tools in this section allow you to integrate with the Office suite.

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## Using Document Libraries

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Document Libraries are where your files will reside in SharePoint. Don't let the name fool you, document libraries can hold any type of file (*except .exe files*). Some departments may have several different libraries for different types of files such as Digital Assets, for images.

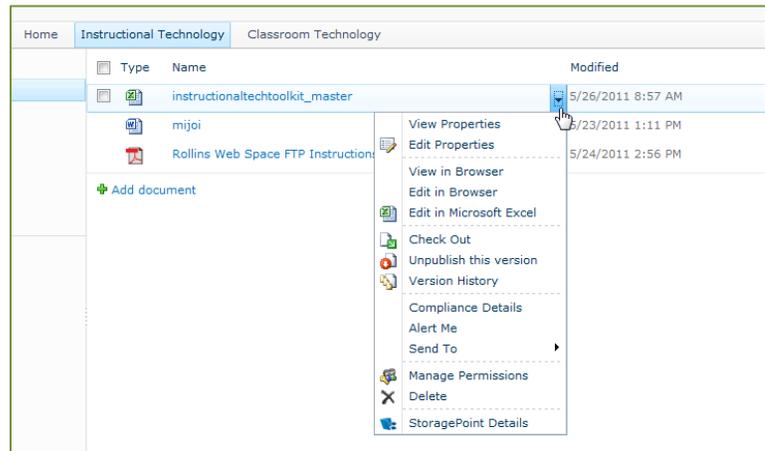
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## Working with Files in Your Document Library

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There are a number of functions available to you in your document library. Many of these functions are accessible through the dropdown menu that is accessible when the document is highlighted.

1. Mouse over the file you would like to work with.
2. Click the drop-down arrow that becomes visible when the file is highlighted.
3. Select the function you would like from the drop-down menu.



Some of the functions you can find in the drop-down menu are:

- **Edit** – This function opens the document for editing (Microsoft Office files) or downloads a copy to your desktop (other files, such as image files or pdfs).
- **Check In/Out** – Check In/Out allows you to check out a file for editing and then check the file back in when you are done. This prevents multiple users from working on document simultaneously and accidentally overwriting each other's edits.
- **Version History** – This function allows you to access previous versions of your documents.
- **Delete** – This function will send the file to the recycle bin for your site.
- **Send To** – Use this function to send file to other locations (other document libraries), email a link to the file to another user, or download a copy of the file to your local computer.
- **Permissions** – This feature allows the Site Administrator to set permission for the specific file.

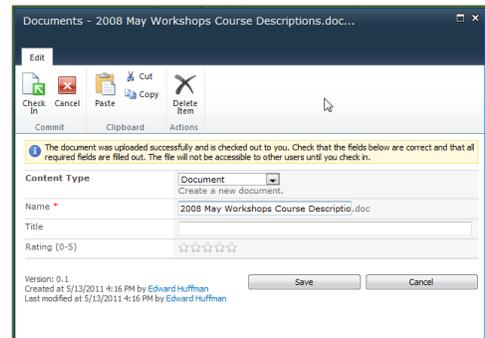
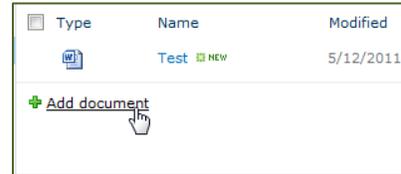
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## Adding Files to Your Document Library

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You can add documents to your Document Libraries a number of different ways. The steps below are just one way to add a file. The following sections explain how to upload multiple files at once and save directly to SharePoint from Office.

1. Browse to the Document Library to which you would like to upload the file.
2. Click on the **Add document** link.
3. Browse for the file you want to upload.
4. Add any comments you might have in relation to the file and click the **OK** button.
5. In the next window, verify the content type and the file name.
6. Add a title to your file if desired and any other metadata that is listed. Required fields will be indicated with a red asterisk.
7. Click the **Save** button to finish the process.



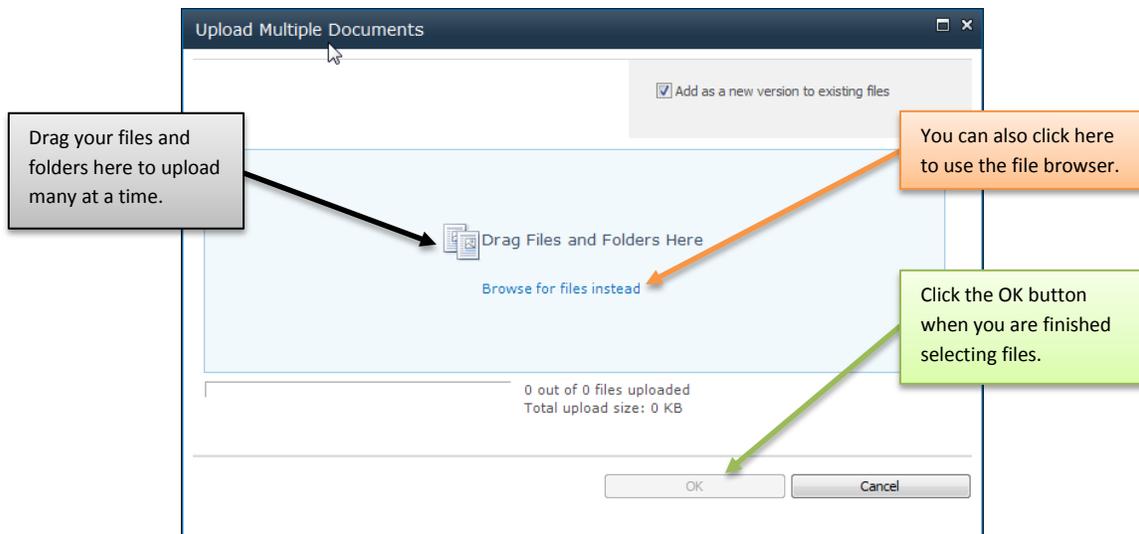
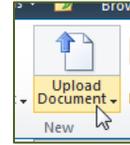
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## Uploading Multiple Files at One Time ( Internet Explorer only)

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Internet Explorer provides the additional functionality of allowing users to upload multiple files at one time. This feature can be useful when migrating a large number of files to SharePoint.

1. Browse to your Document Library.
2. Click on the **Documents** tab (located under Library Tools).
3. Click on the lower half of the **Upload Document** button.
4. Select "Upload Multiple Documents" from the drop-down.
5. The window that opens will allow you to drag and drop files and folders to it or browse for the files.



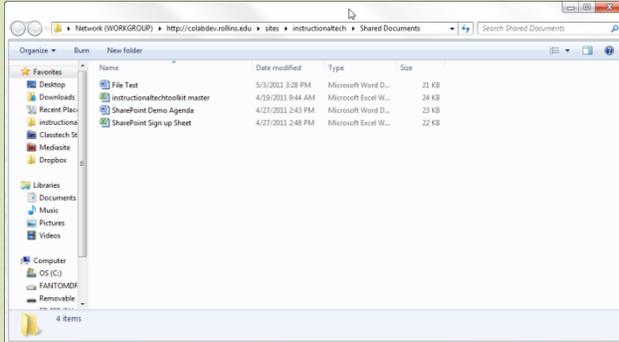
6. Click the **OK** button when you have finished selecting the files you would like to upload.



## Tech Tip

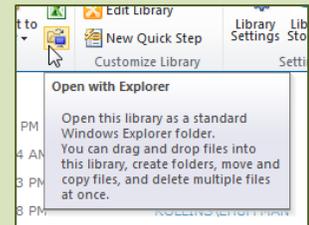
### Open in Explorer (PC Only)

The Open in Explorer function is only available to PC users and is located under the Library Tab (see Library Tools for more information); it allows you to open your document library in Windows



Document library opened in Windows Explorer.

Explorer. Once in Windows Explorer you can drag and drop files into your document library. This is especially useful when you need to add numerous files to your document library.



The Open in Explorer command is located under the Library Tab in Library Tools.

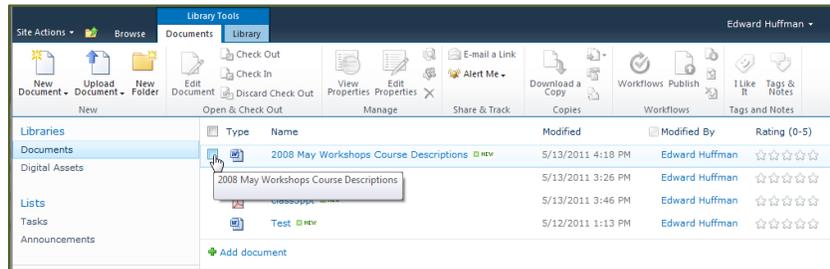
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## Editing Files in Your Document Library

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You can easily edit any Office document from SharePoint. Other files types can be easily downloaded and opened in their respective applications (i.e. PDF files).

1. Browse to your Document Library.
2. Select the checkbox to the left of your file.
3. For Office files (Word, PowerPoint, Excel, etc.), click on **Edit Document** (located under the Documents Tab).



4. For non-Office files (i.e. PDF files, images), click on **Download a Copy**.
5. Office documents will open in their respective programs and other documents will be saved locally to your computer.

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## Check In/Check Out

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The Check In/Check Out feature prevents two users from simultaneously editing and then overwriting each other's edits. Your site administrator will work with your department to see if this is a feature that you will use or not.

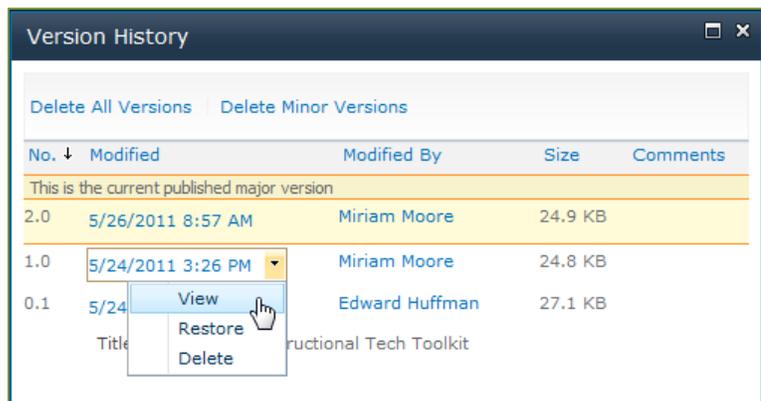
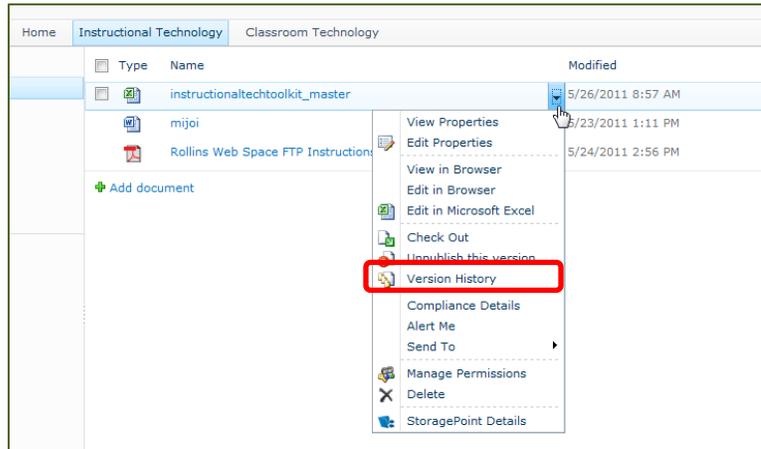
This feature works well with documents in your document library. However, this function does not work well with the Digital Assets library.

## Document Versioning

Document versioning is set up so that SharePoint will save the last 5 versions of your document. This helps with comparing changes, especially those made by another user or when you have to undo some large part of a document. By default, users editing documents will be required to check the document out (see Check In/Check Out).

To access previous version of a document:

1. Browse to the Document Library where the document resides.
2. Mouse over the document in the list of your documents.
3. Click on the drop-down arrow that appears when the document is highlighted.
4. Select **Version History** from the drop-down menu.
5. The Version History window will open and show the different versions of the document.
6. Click on the date/time link to open that version of the document or mouse over the date/time link and click the drop-down arrow to list the available options (delete, restore, view).



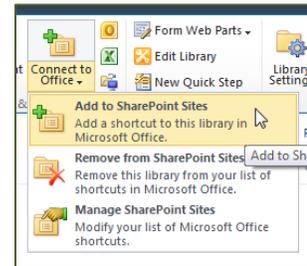
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## Connect to Office

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The Connect to Office feature adds a shortcut to your current SharePoint site in your Microsoft Office suite programs (i.e. Word, Excel, PowerPoint, etc.) on your computer.

1. Access the Document Library to which you would like to link to your Office programs.
2. Click on the **Connect to Office** button.
3. Select the **Add to SharePoint Sites** option.

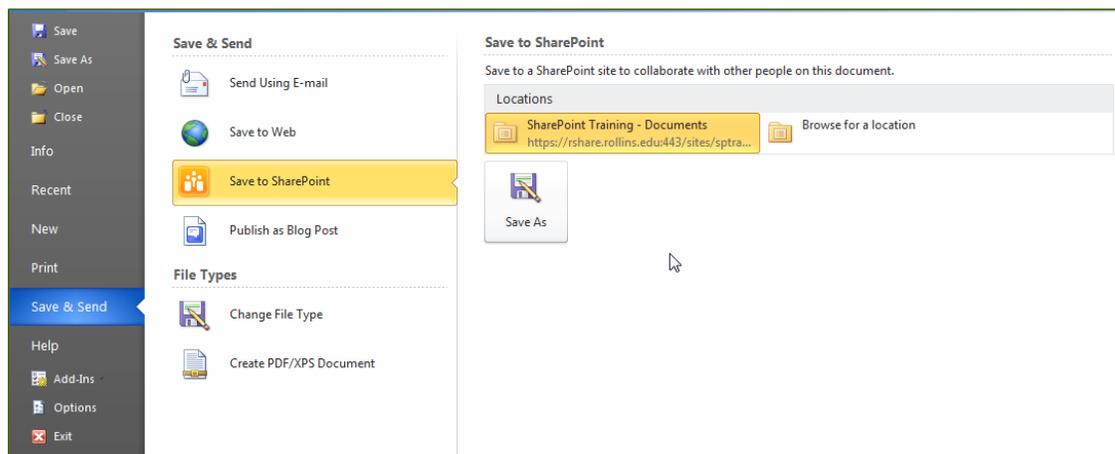


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## Save Directly to SharePoint from Office

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Once you have created shortcuts to your SharePoint site(s) using the Connect to Office feature, you will be able to save directly to your SharePoint site(s) from any of your office applications.



1. Complete the "Connect to Office" steps above.
2. In the office application, click on the **File** tab.
3. Click **Save & Send**.
4. Select **Save to SharePoint**.
5. Select the SharePoint location you would like to save to under **Locations**.

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## Metadata

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Metadata, simply put is information about information. An example of metadata could be all of the information associated with a digital image. The image will have a file name, but there are scores of other data that can be associated with it as well, such as: date taken, and photographer. Other data can also be applied to it depending on the context. You may want to capture the subject of each image and this would be considered metadata. Metadata can also be thought of as the properties of a file or document (i.e. author, date created, date modified, keywords, etc.).

So why use it? We metadata is useful in allowing us to leverage search tools. The more information we know about our files, the easier they will be to find. Older systems use a folder structure and searching based primarily on filenames. Newer systems leverage metadata and can streamline file storage in retrieval.

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## Metadata in SharePoint

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In SharePoint Metadata is used to help you organize and find your files. By using metadata you can use Views sort your files based on any of the metadata fields you incorporate. Additionally metadata will help speed up and improve the results you get when using the search function.

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## Types of Metadata Information in SharePoint

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There are several types of information you can select from when adding new Metadata fields. Below are descriptions of some of the most common types you will come across.

- **Single Line** – This information type allows for a single line of information.
- **Multiple Line** – This information type is like a single line but allows for more content across multiple lines.
- **Choice** – Using the choice option allow you to specify choices from a list. The user can then select between the options in the list.
- **Number** – Using this information type will force users to enter the data in the form of a number.
- **Yes/No** – This option requires the user to select between two options: Yes & No.

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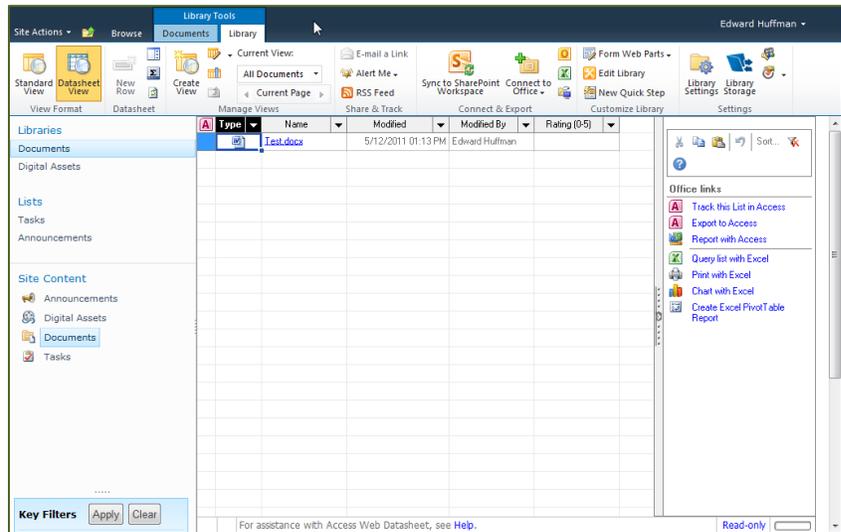
## Datasheet View

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Changing your View to Datasheet enables you to easily see your files listed in a spreadsheet like view with all of you metadata for the files displayed in columns. You can also easily add new metadata fields in this view and enter metadata for files which do not have it completed.

### Changing to Datasheet View

1. Navigate to your Document Library.
2. Click on the Library Tab under Library Tools.
3. Click on **Datasheet View** in the View Format group on the left side of the screen.
4. On the right side of the screen, you will see some additional tools available in the Datasheet View.
5. Click on **Standard View** to return to the default view.



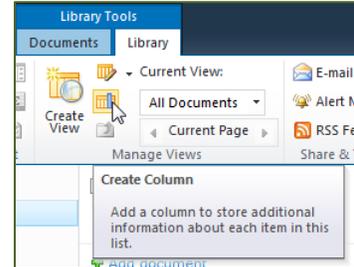
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## Adding New Metadata Fields *(Site Administrators Only)*

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If you would like to add new Metadata fields to your Document Library, follow the steps below:

1. Go to Datasheet View (*see previous section*).
2. Click on the Create Column button (located under the Page tab).
3. On the page that loads, select the type of information you would like in your new field.
4. Add a description for the new field, this will allow others to know the purpose of the field.
5. Select whether or not you would like to make this a required field.
6. Adjust the other settings on the page. These settings will vary depending on the type of information selected.
7. Select the checkbox to “Add to default view”.



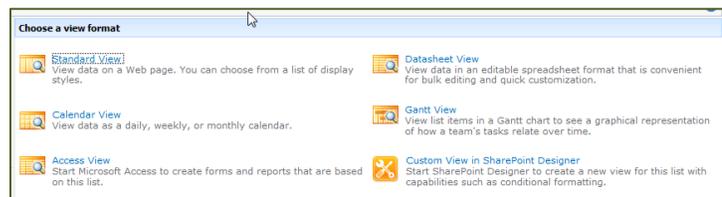
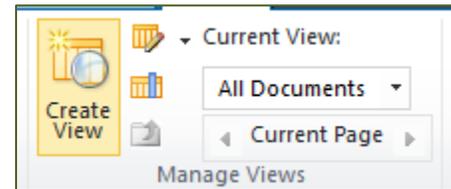
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## Creating a New View

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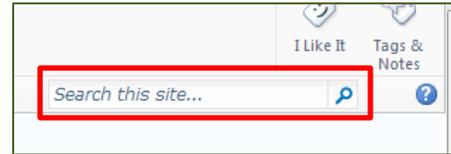
You can create Views that only show you a subset of your documents based on criteria that you define. Any of the Metadata fields can be used to sort or filter your results. The Views that you can create will be for your use only; if you would like a View for your entire department or group to use, your Site administrator will need to create the View.

1. Navigate to the Document Library where you want to add the View.
2. Click on the **Create View** button.
3. Select **Standard View**.
4. Enter a **View Name**.
5. Select the columns you would like to appear in the View and the order you would like them to show up.
6. Select the Sort order for your View.
7. Select the Filters (if any) you would like to use for your View.
8. Click the **OK** button.



## Using the Search Function

SharePoint is optimized for searching your files. However, there are steps you can take to make the search function work better. The most impactful thing you can do is include some amount of metadata. What data you choose to include, if any, is up to your department.



Follow the instructions below to use the search function in SharePoint:

1. Type the search term into the search field in the upper right side of the page.
2. Click on the magnifying glass icon to begin the search.

Use the links on the left side of the screen to refine your search.

Your search results will be listed here. Click on the link to access the file.

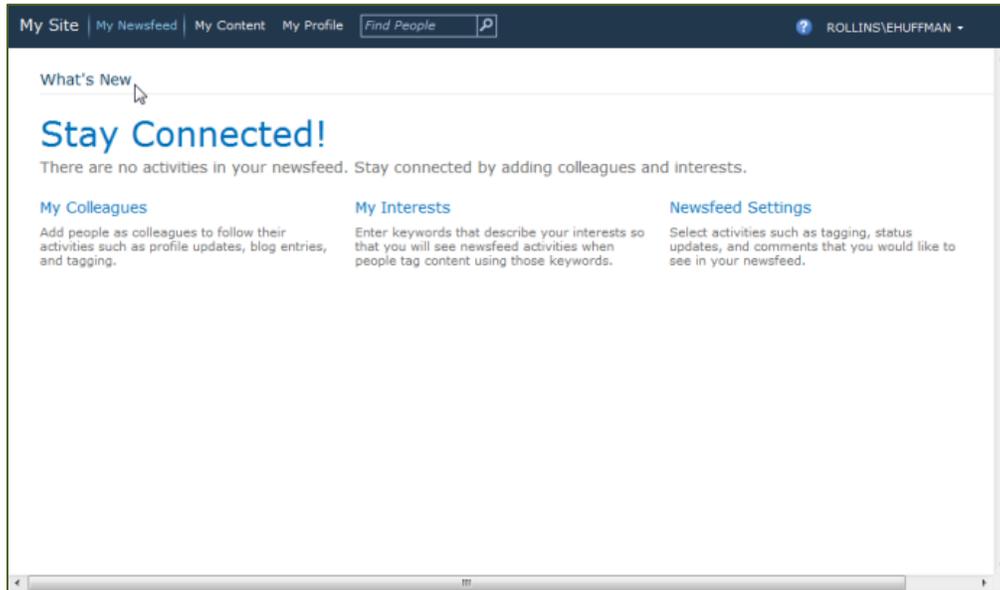
3. Your search results will be listed on the page that loads.
4. Use the links on the left side of the page to refine your results by author, file type, etc. if necessary.
5. Click on the link for a file to download or open the file.

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## MySite

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Your SharePoint MySite can be likened to your H drive on the old Novell system. There are, however, a few differences. You will have the ability to save your files in a private area that is backed up periodically. Additionally, you will have a shared space for documents and other files you would like to share with colleagues.



### Accessing Your SharePoint MySite

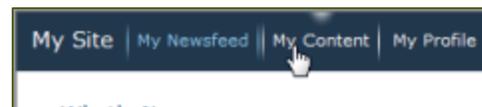
1. Log into SharePoint.
2. In the upper right corner, click on your username.
3. From the drop-down menu, select **MySite**.

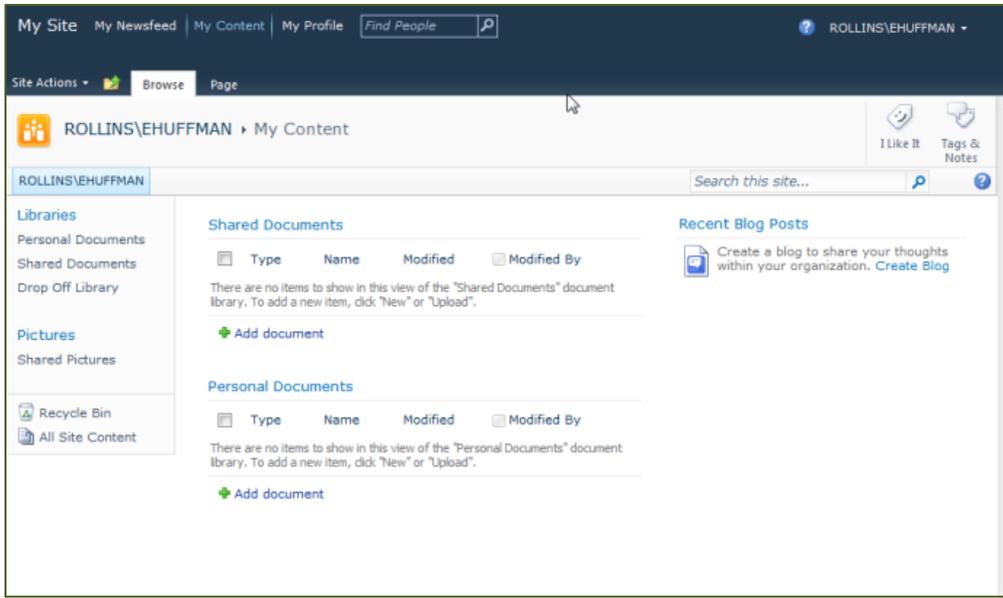


### Accessing or Adding to Your MySite Content

In order to add or access your content you will need to:

1. Access your SharePoint MySite (see instructions above).
2. Click on **My Content** in the top of the main MySite window.





3. The page that loads is very similar to your departmental SharePoint site. You will have two default document libraries: *Shared Documents* and *Personal Documents*.
  - a. **Shared Documents** – By default, everyone has access to these files. You can adjust permissions to set who can modify or access these files.
  - b. **Personal Documents** – These documents are accessible only by you. Files moved from your old H drive will now reside here. If you want to share one of the files located here copy or move the file to your Shared Documents.
4. Files can be added to these libraries in the same way they are added to your department site. (For detailed instructions see Adding Files to Your Document Library).

**NOTE:** Document Libraries can be a bit confusing as they can actually hold any type of file, with the exception of executable files (i.e. \*.exe).

### Shared Document Permissions

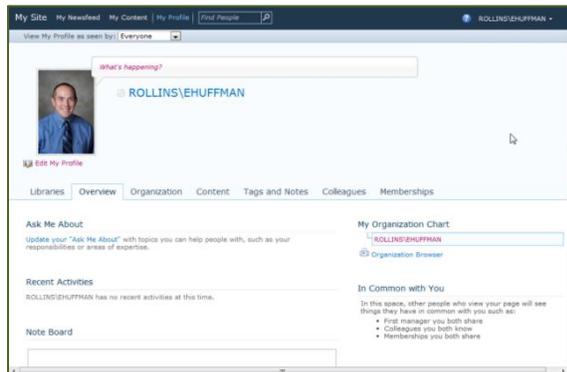
You can adjust who can see your shared files and what can be done with your shared files though the use of permissions. While only Site administrators have ability to set permissions for files on your main SharePoint Site, everyone can set permissions for the shared files in their MySite.

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## Your SharePoint Profile

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SharePoint offers each user a profile that provides information about you. Your profile also is one more way to access the content to which you have rights.



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## Microsoft SharePoint Workspace 2010 (PC Only)

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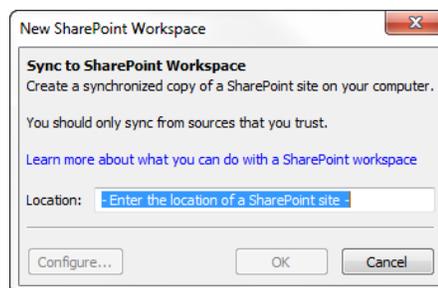


Not to be confused with the main SharePoint environment, which is online and accessible through a web browser, SharePoint Workspace 2010 is a application that allows you to work on your SharePoint files offline and then sync those files with SharePoint once you have internet connectivity.

### Configuring SharePoint Workspace with SharePoint

You will need to configure SharePoint Workspace in order to use it with your Rollins SharePoint site. Follow the steps below to configure SharePoint Workspace.

1. Open **Microsoft SharePoint Workspace** (usually located under Start>All Programs>Microsoft Office).
2. Click on the **New** button in the upper left portion of the application window.
3. In the window that opens, enter the location of your SharePoint site (you can copy and paste this from your browser or type it directly). For example, for the Instructional Technology SharePoint site, I would use the URL: <https://rshare.rollins.edu/sites/instructionaltech> .
4. Click the **OK** button.
5. You will be prompted for your username and password.
6. The sync process will automatically begin after you log in. The length of this process is determined by the amount of data in your SharePoint site.
7. Click **Enter Site**.
8. Your files will be shown in the Workspace window. Files from your main Document Library will be found under "Shared Documents".



**NOTE:** You will not have to repeat the configuration steps, as the site will now be stored and listed in the Launchbar window.

## Microsoft Document Connection (Mac Only – Requires Office 2011)



Microsoft Document Connection allows Mac users to download a local copy of their SharePoint files and work with them when offline. The files are synced up when the user connects to the internet.

### Configuring Microsoft Document Connection

1. Click on the **Microsoft Document Connection** icon in your taskbar. (If the icon is not in your taskbar it will be located in your Applications folder.)
2. Click on **Add Location** and select “**Connect to a SharePoint Site...**”.
3. Enter the URL for your department’s SharePoint site. An easy way to get the URL is to bring up the site in your browser and copy and paste the URL from the browser.
4. Enter your username and password.
5. Click the **Connect** button.
6. Your SharePoint site will be listed on the left side of the Microsoft Document Connection window (under SharePoint).

