

Getting Started with SharePoint

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What is SharePoint?

SharePoint is a web based application that can be installed on most Microsoft Windows Servers and accessed from any machine in the network via a web browser. It is simply an internal web site also known as an intranet. Into this web site you can store all sorts of information including documents, spreadsheets, emails etc. You can also store other general information that is typically part of any business including things such as tasks, calendars, projects and more. In many ways it can become the central repository for all the information you have in your business.

What does this document contain?

This document will examine the basic operation of SharePoint, specifically on Microsoft Windows Small Server 2008 as it represents the latest version of the software. If you are using and older version of Windows Server you find a previous version of SharePoint installed but much has changed since these previous versions, however there are still some similarities. As such, this document may still provide some insight into the basics of older versions of SharePoint.

Specifically this document will examine the following components of SharePoint:

1. Shared Documents
2. Calendar
3. Tasks
4. Picture Libraries
5. Recycle bin
6. Search

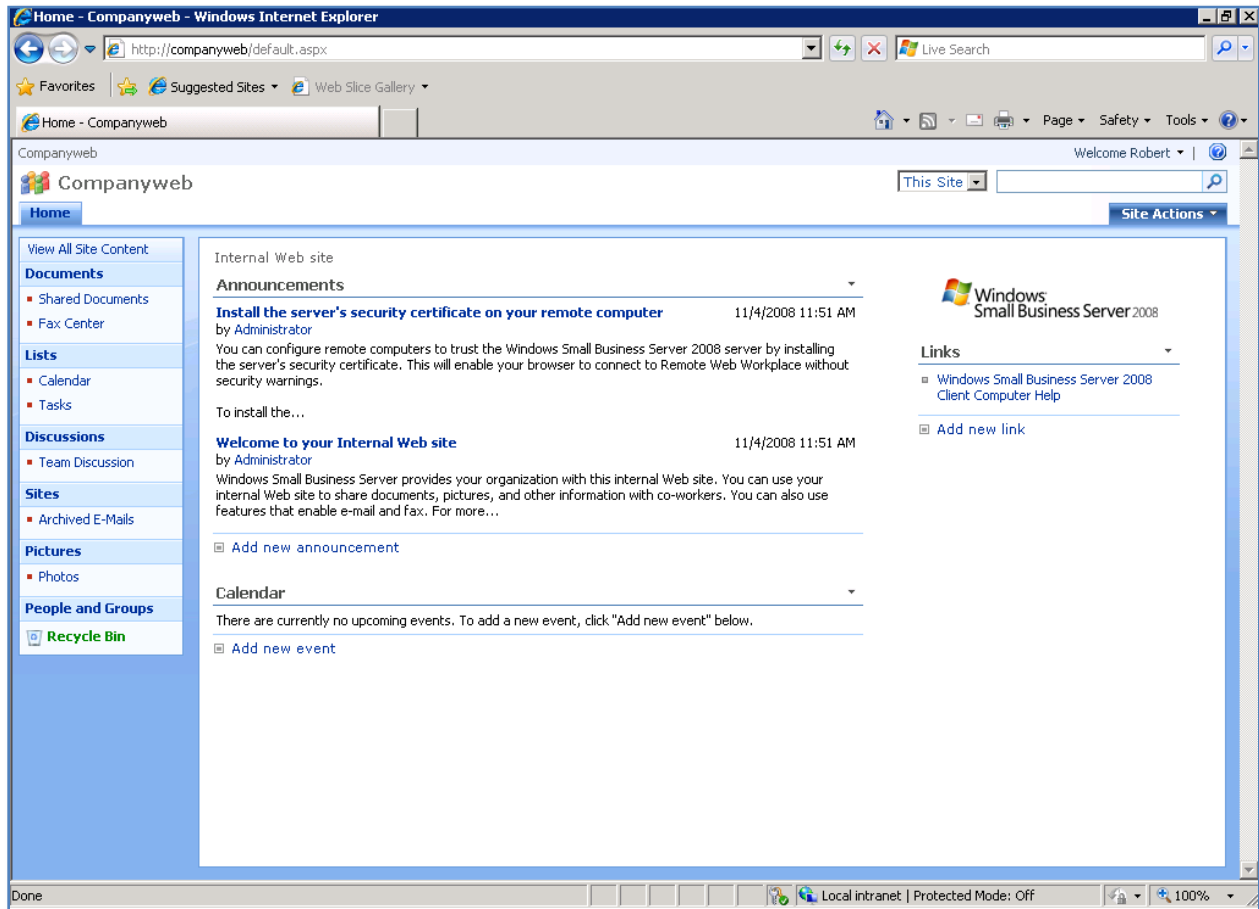
This document will take you step by step through these areas showing you each item in detail, including screen shots. If you have access to SharePoint already you are encouraged to follow along with the tutorial to get a better feel for the power of SharePoint.

You will also find a number of common SharePoint terms Underlined throughout the document. You will find a summary of these terms in the Glossary at the end of the document.

Also at the end of the document you will find a list of resources to help improve and extend your understanding of the SharePoint technology.

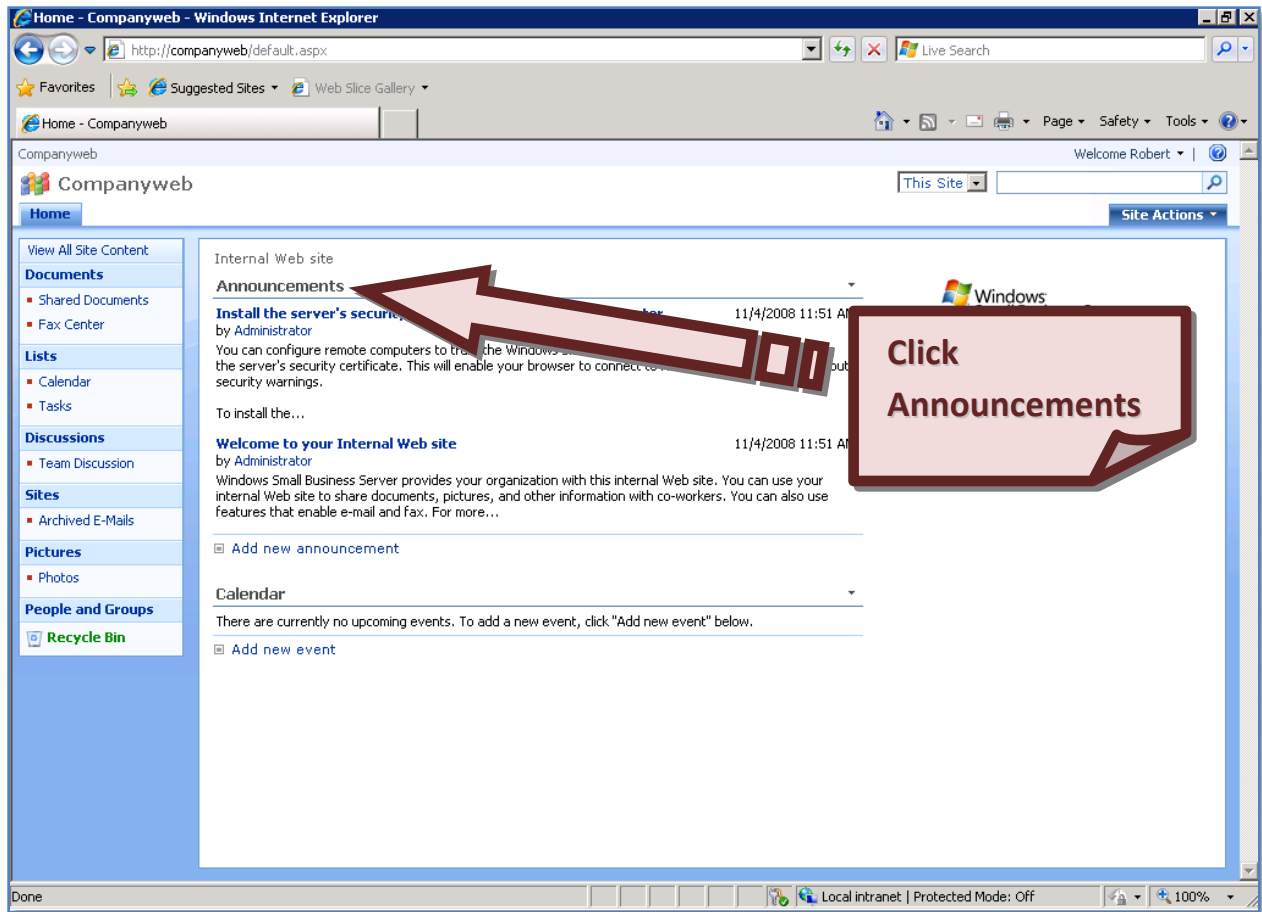
How can I use SharePoint?

SharePoint is accessed by simply opening a browser on any machine connected to a Windows Server and typing the URL of the SharePoint site as provided by your network administrator into the address line. After doing this you should now see the following displayed:

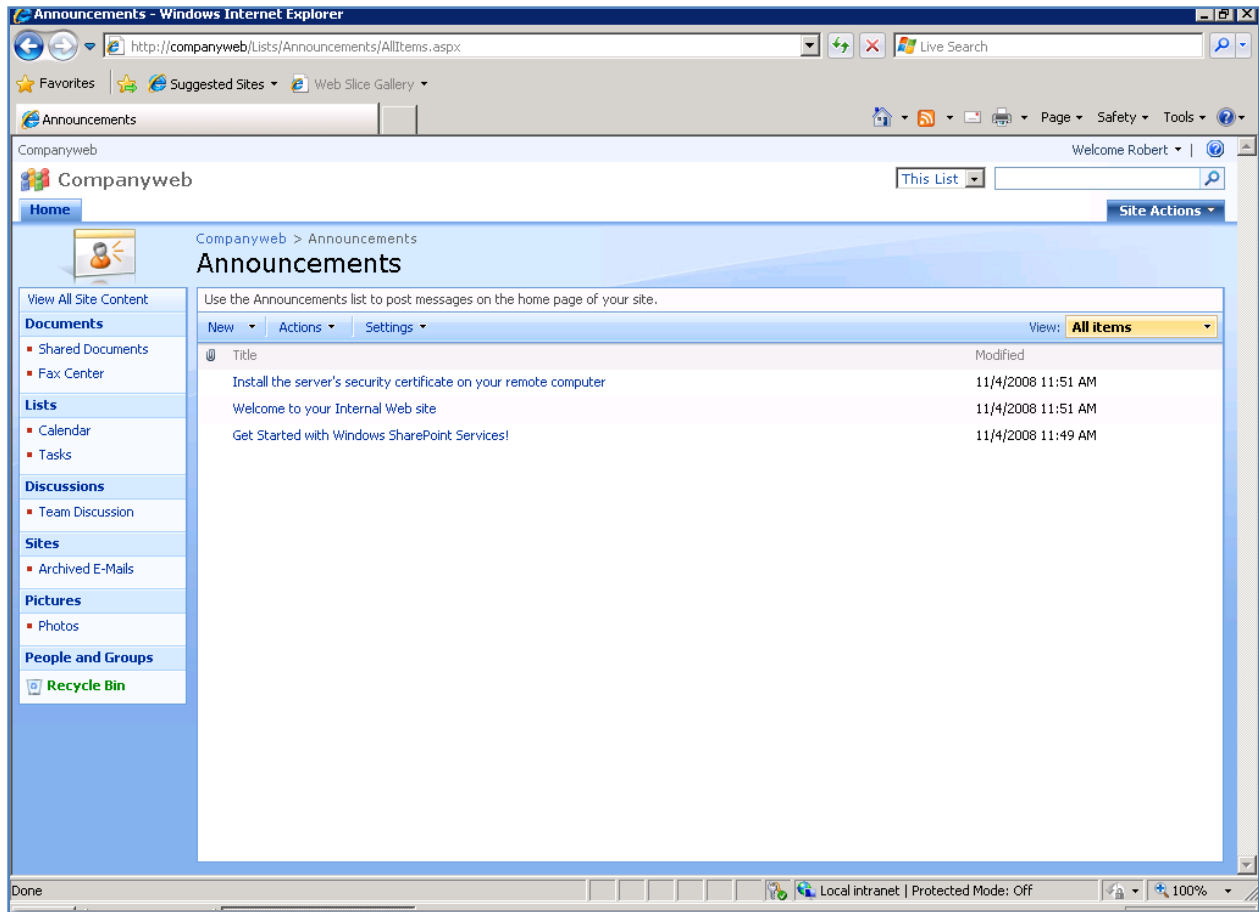


You can use just about any browser to access SharePoint however you get the most functionality when you use Microsoft's Internet Explorer and for that reason this is what we will consider here. If you choose another browser then some of the options and displays may be different.

Because SharePoint is just like a web site you can navigate around it just like other web pages. You will notice that the SharePoint pages contain a number of hyperlinks which can be clicked, allowing navigation to more information. For example, click on the word "Announcements" in the middle of the page to be taken to the *Announcements* area of SharePoint.

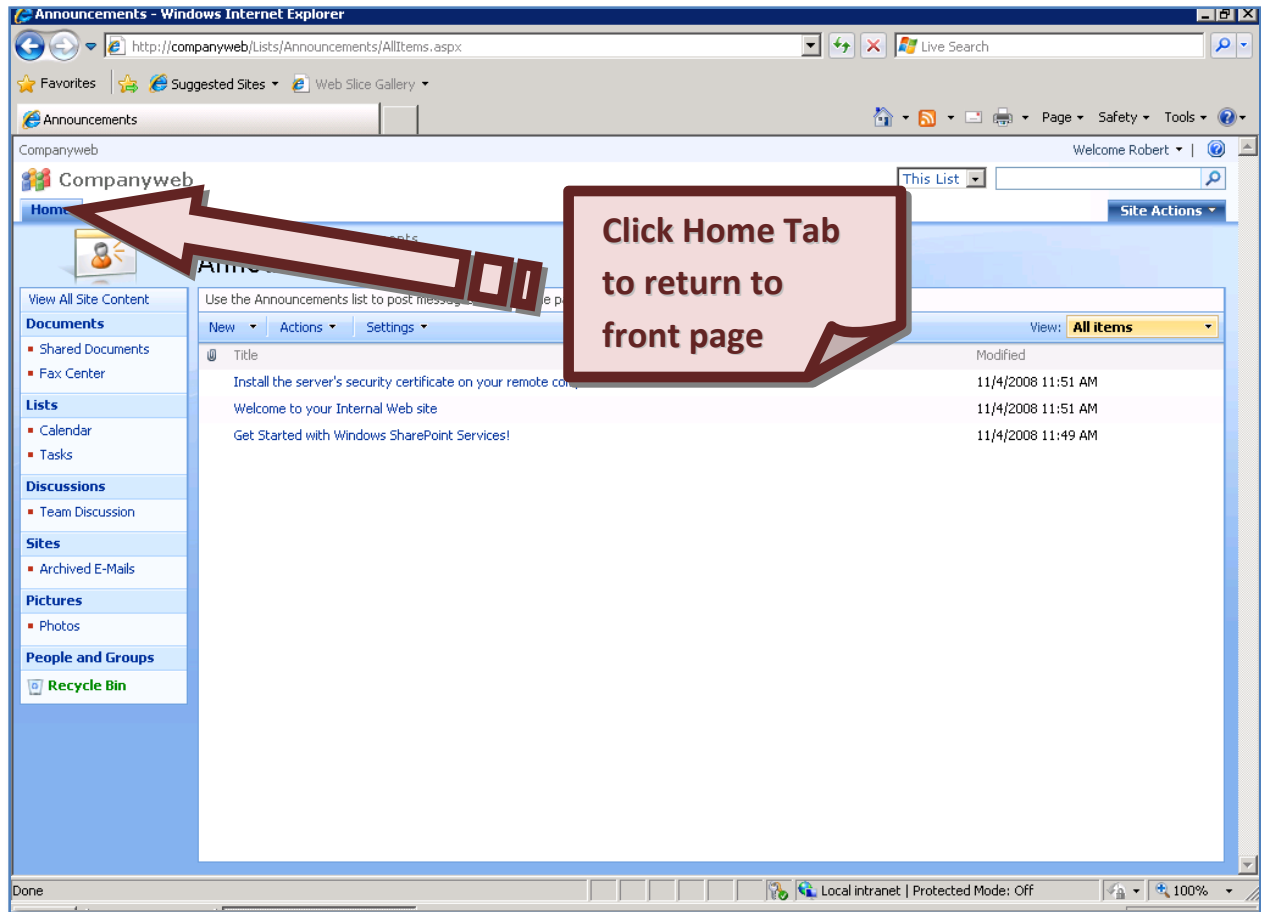


Once you have clicked on the hyperlink *Announcements* you should see a screen like this:

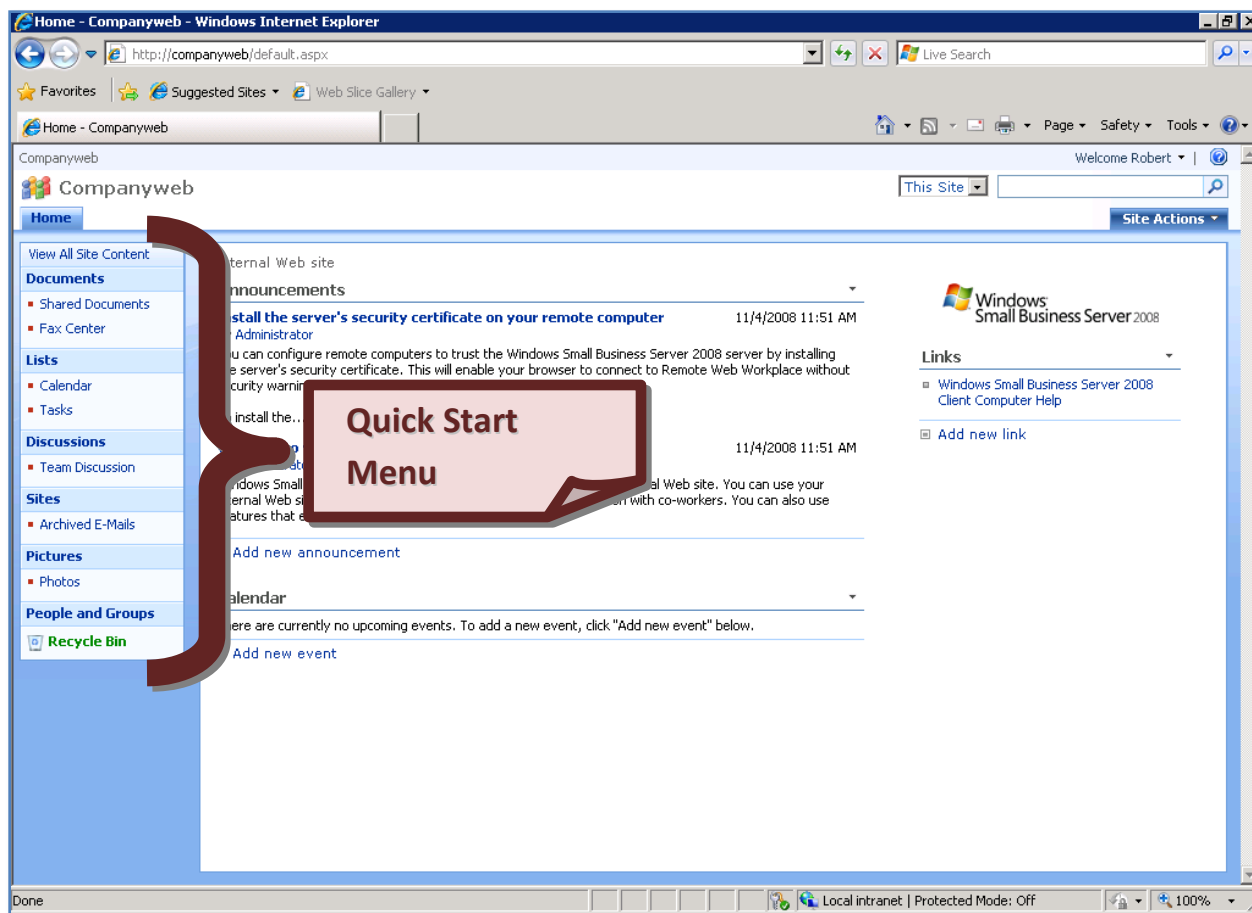


To return to the front page again simply press the *Back* button in your browser.

You can also return to the front or *Home Page* of SharePoint by clicking the *Home* tab in the top left of the screen.



When you return to the *Home Page* you will notice that SharePoint is laid out in a specific manner.

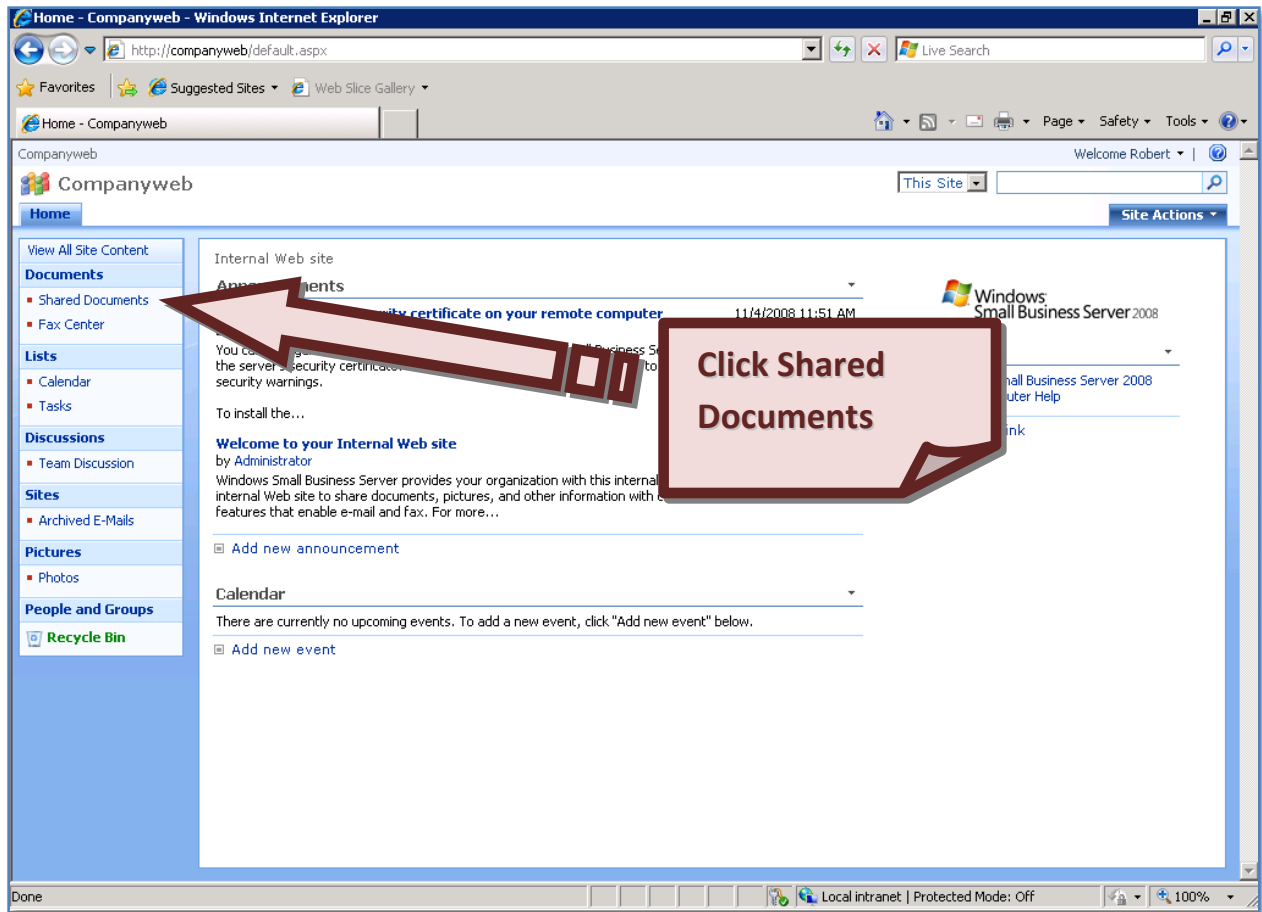


Down the left hand side is what is known as the *Quick Start Menu*. This menu is generally shown on every page in SharePoint and allows you to easily navigate to any location in SharePoint directly by clicking on that item.

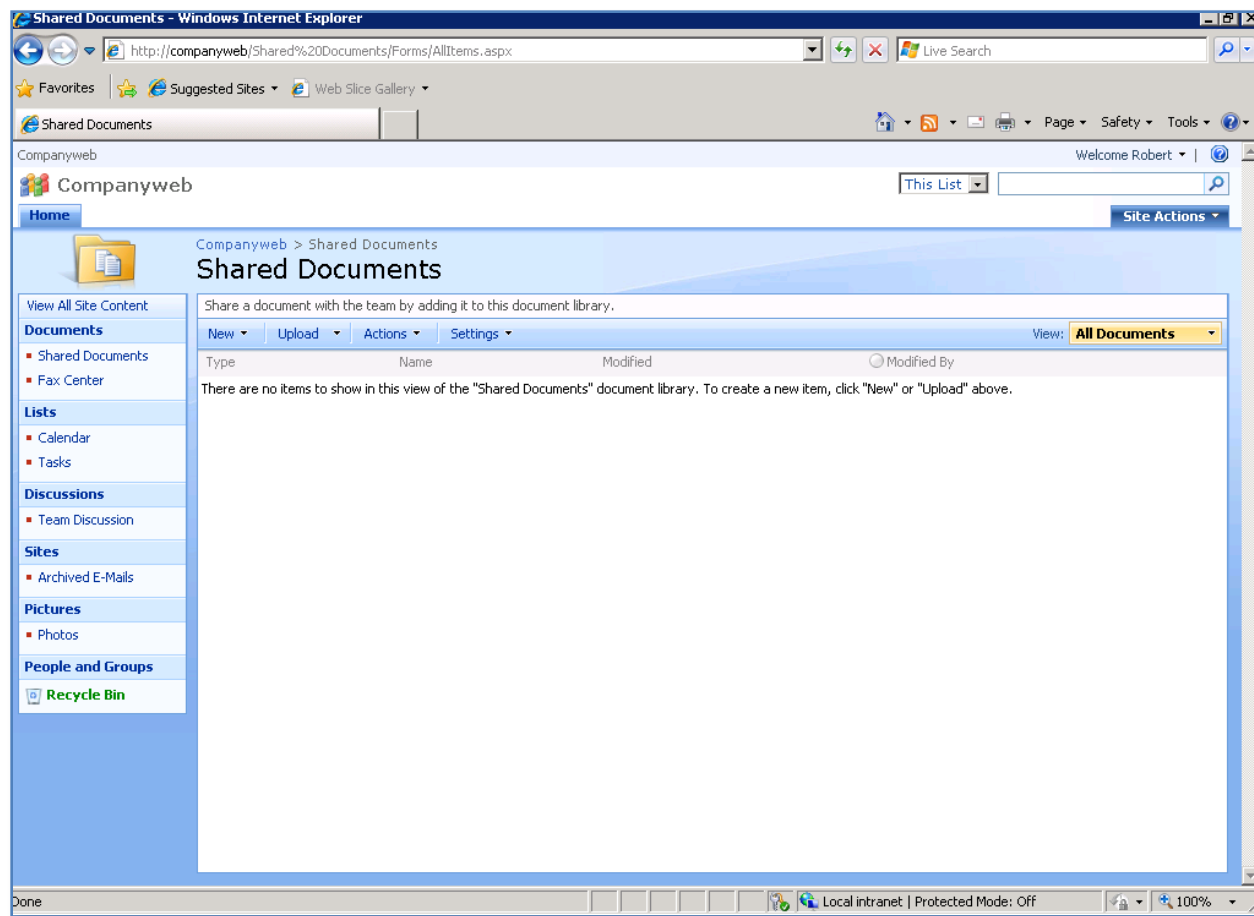
We will now navigate briefly through this *Quick Start Menu* to give you an overview of the components that SharePoint contains by default.

1. Shared Documents

Click on the link *Shared Documents* that appears on the *Quick Start Menu* on the left hand side of SharePoint.

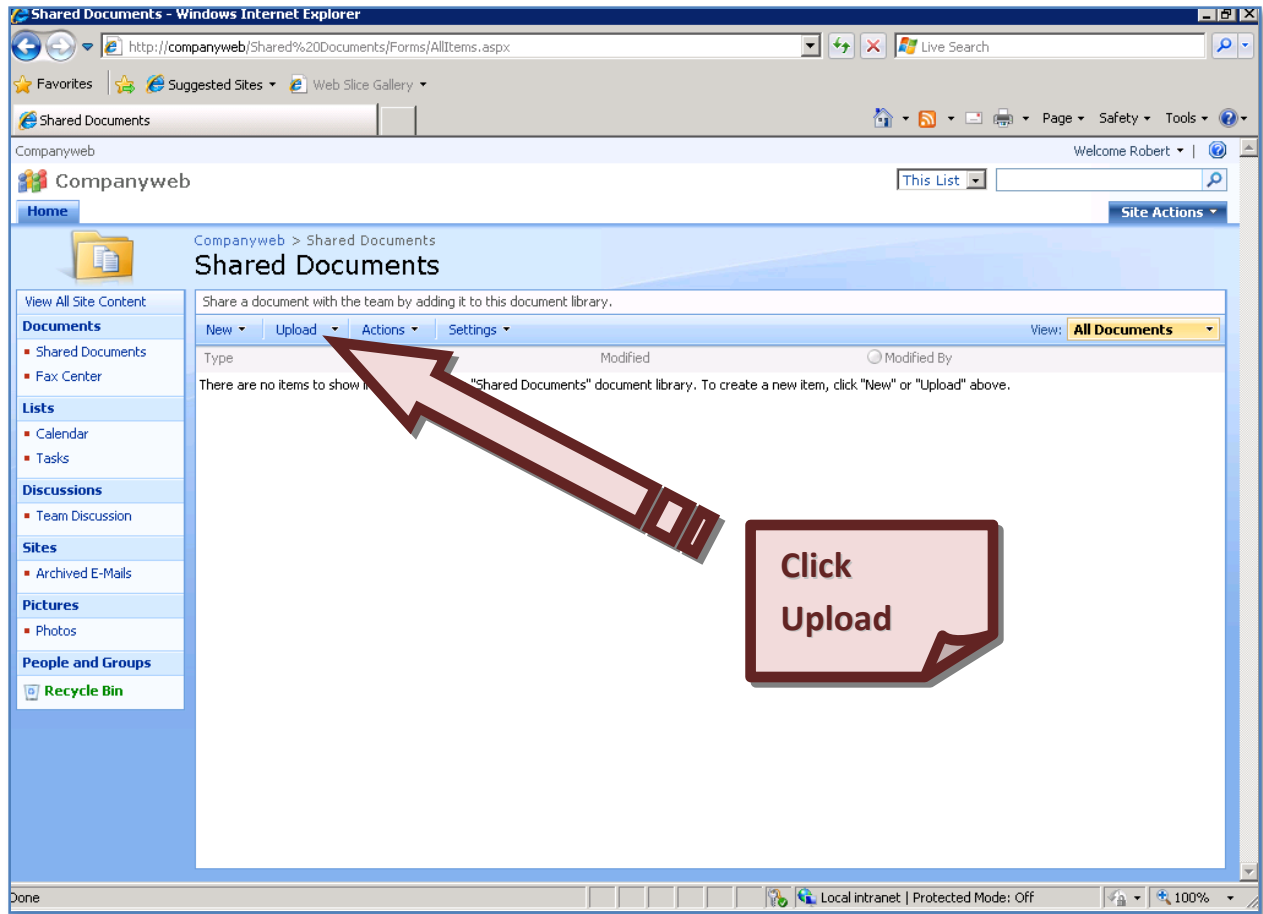


You should now see a screen like:

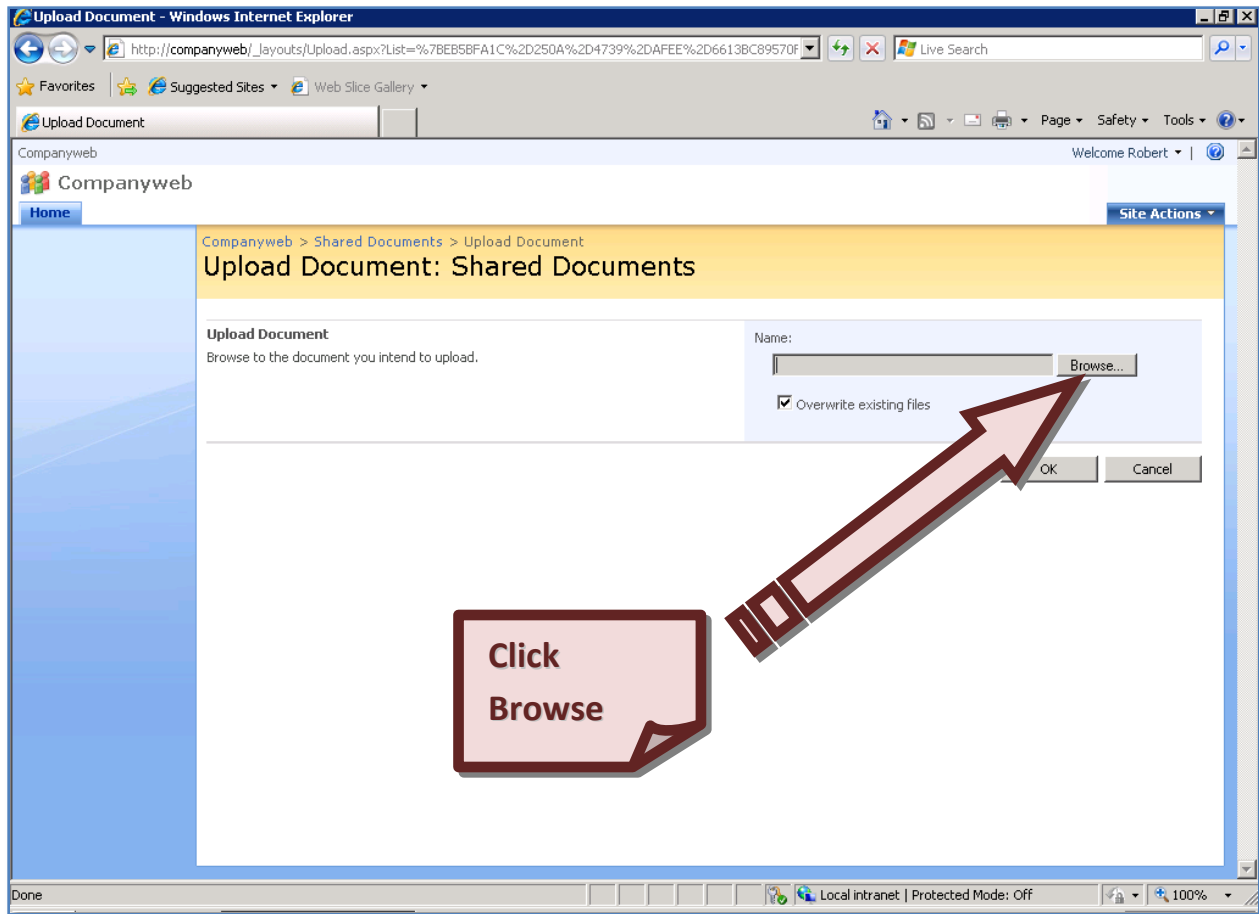


The *Shared Documents* area is called a Document library in SharePoint. In here you can store any sort of file you wish including things like documents and spreadsheets.

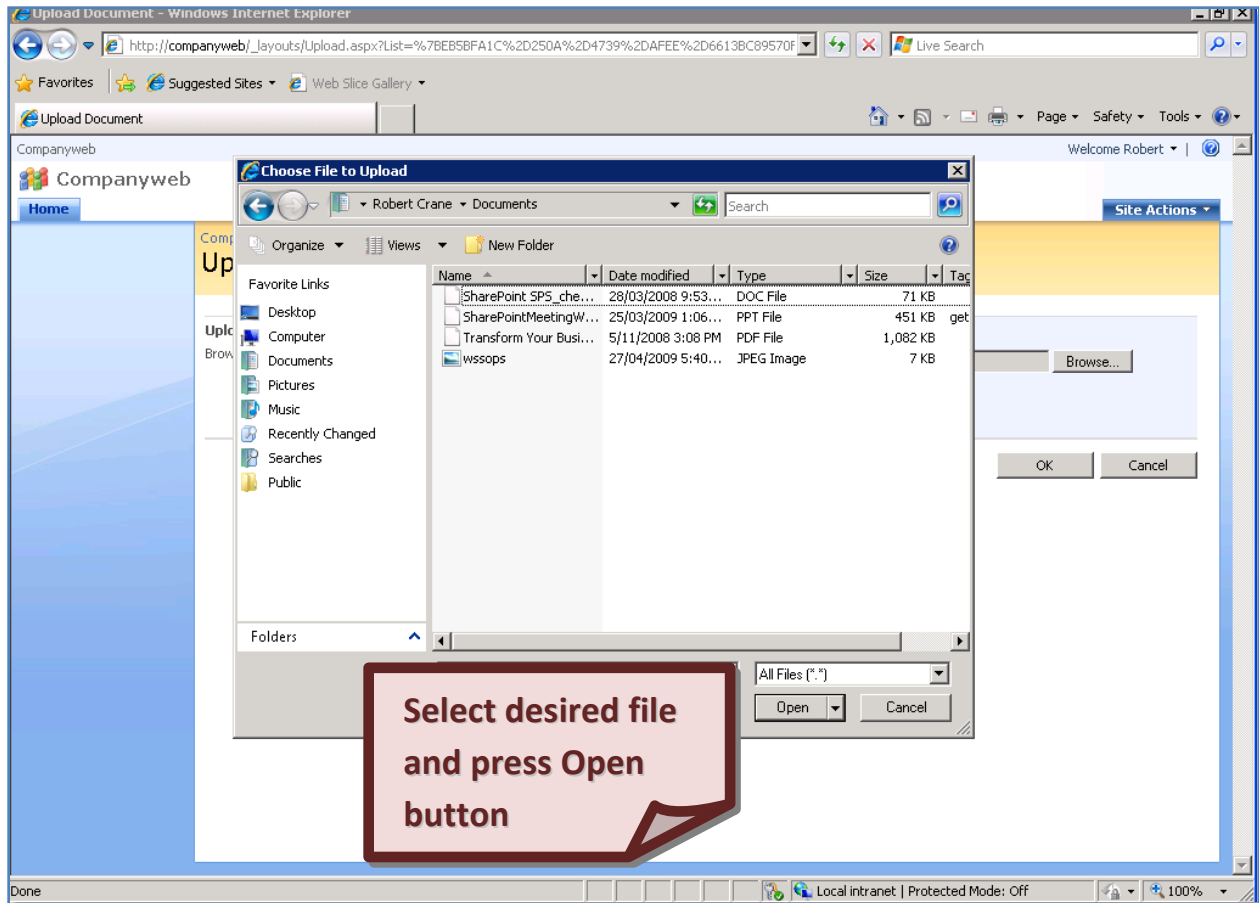
The first step in using a Document Library is to upload some documents. To do this click on the *Upload* button from the menu bar of the Document Library.



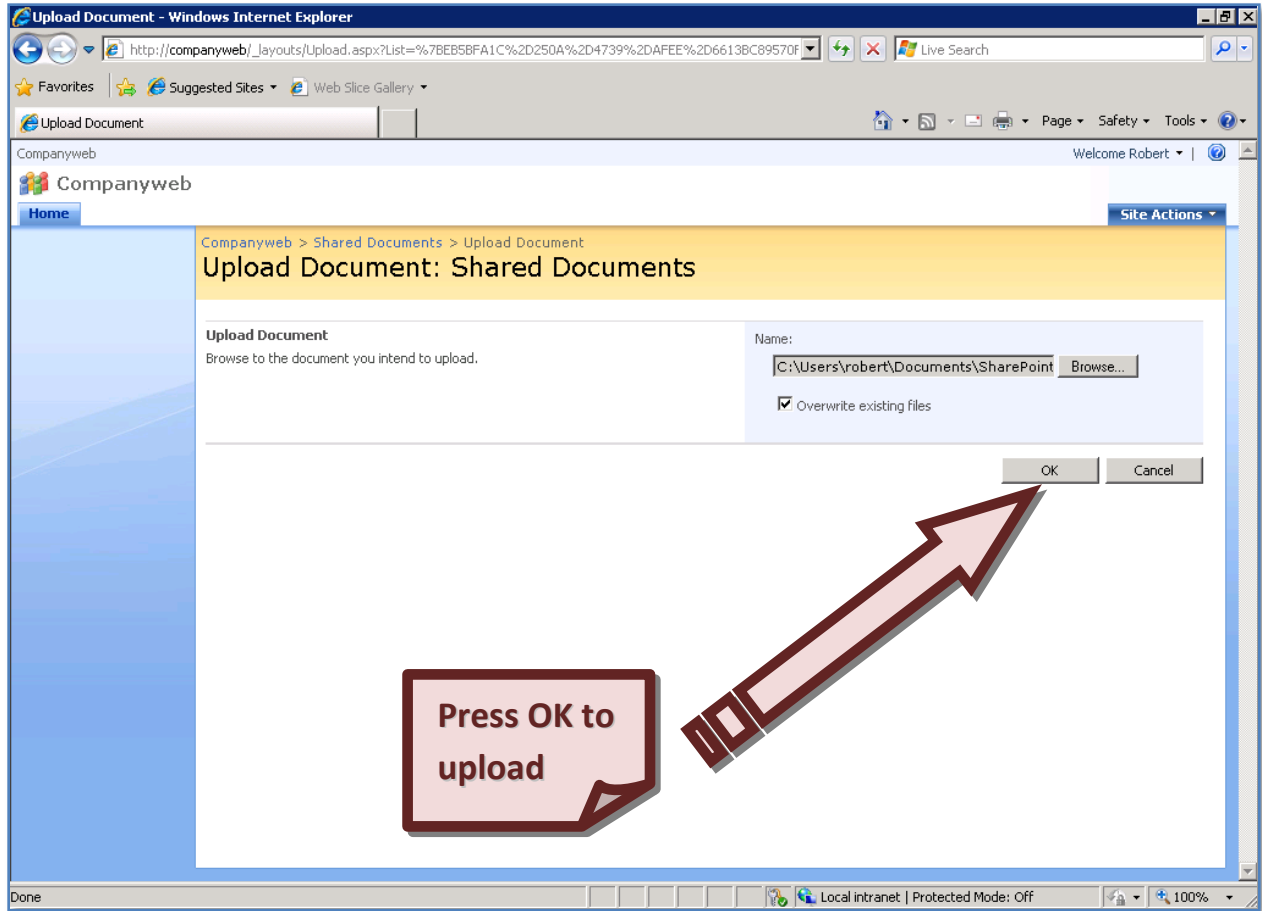
You should now see a screen like:



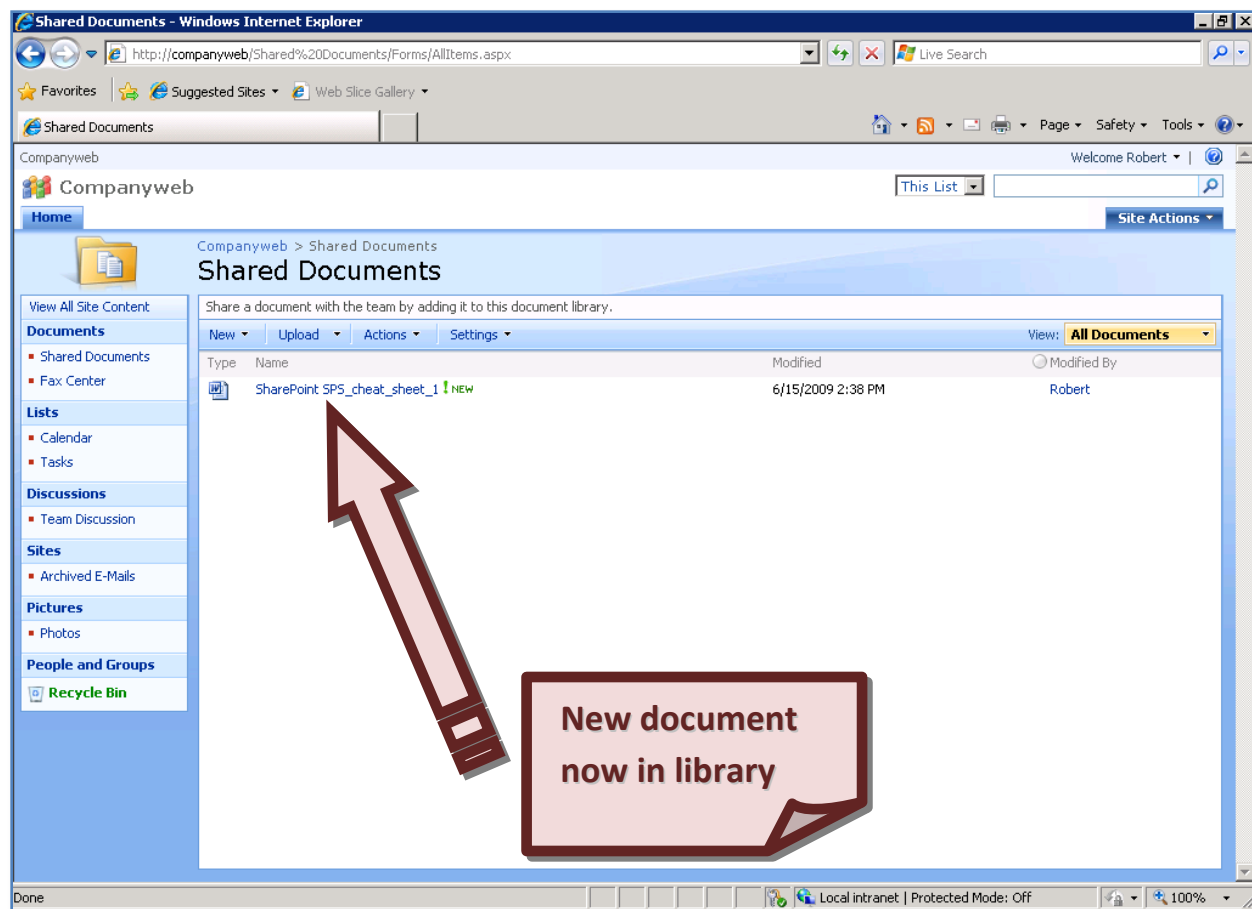
If you now click the *Browse* button you can navigate to any file on your local system like so:



After selecting the file to be uploaded and pressing the *Open* button the location of that file will be transferred to the *Name* field in SharePoint.



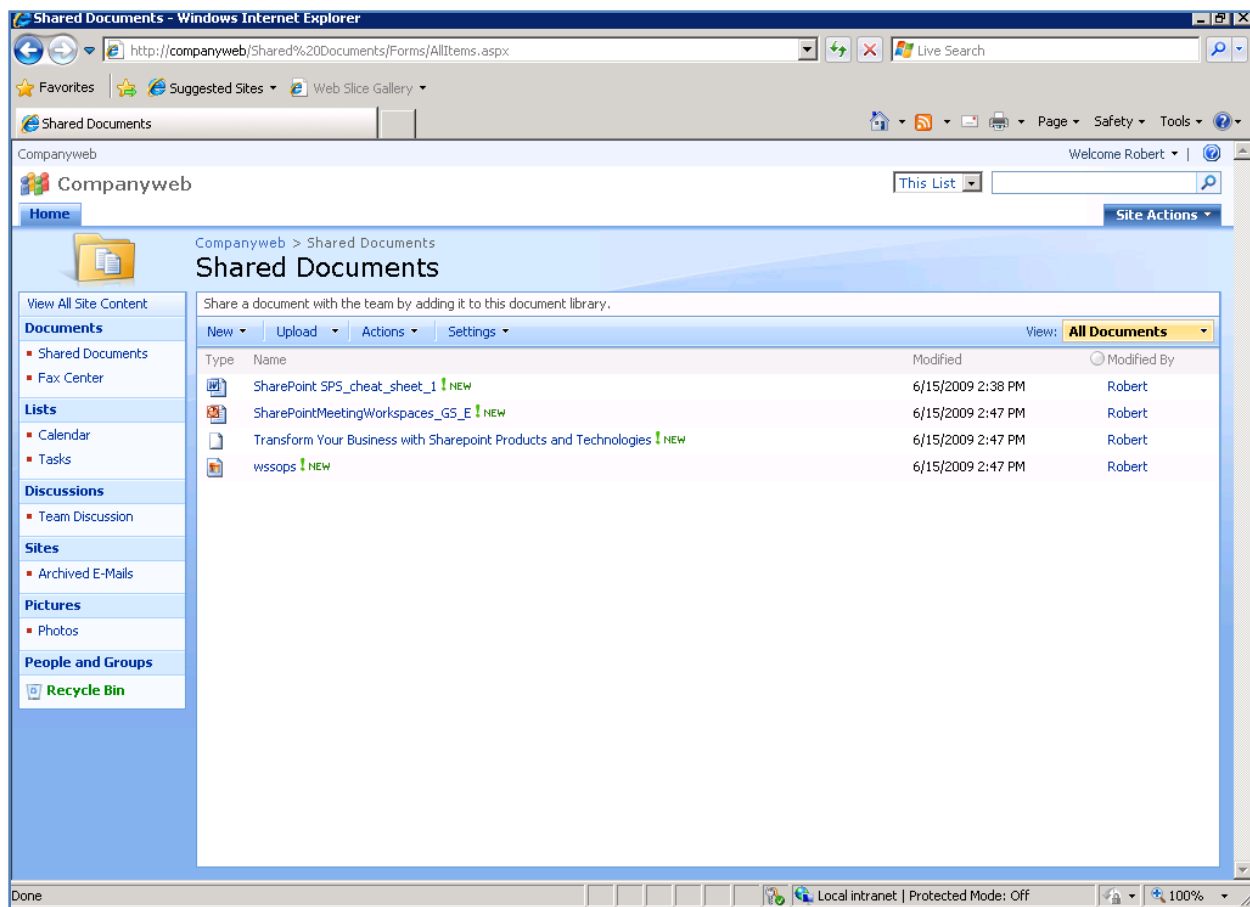
To upload the selected document to the *Shared Document* area of SharePoint, simply press the *OK* button.



You should now see the document you selected appear in the list for the Document Library. In this case a Word document has been uploaded and the Word icon appears at the beginning of the line to indicate the document type.

You can repeat this process of selecting *Upload* in *Share Documents*, then pressing the *Browse* button and locating the desired file and finally selecting *OK* to upload documents. Please take the time to upload a few different documents into the *Shared Documents* area using the above process.

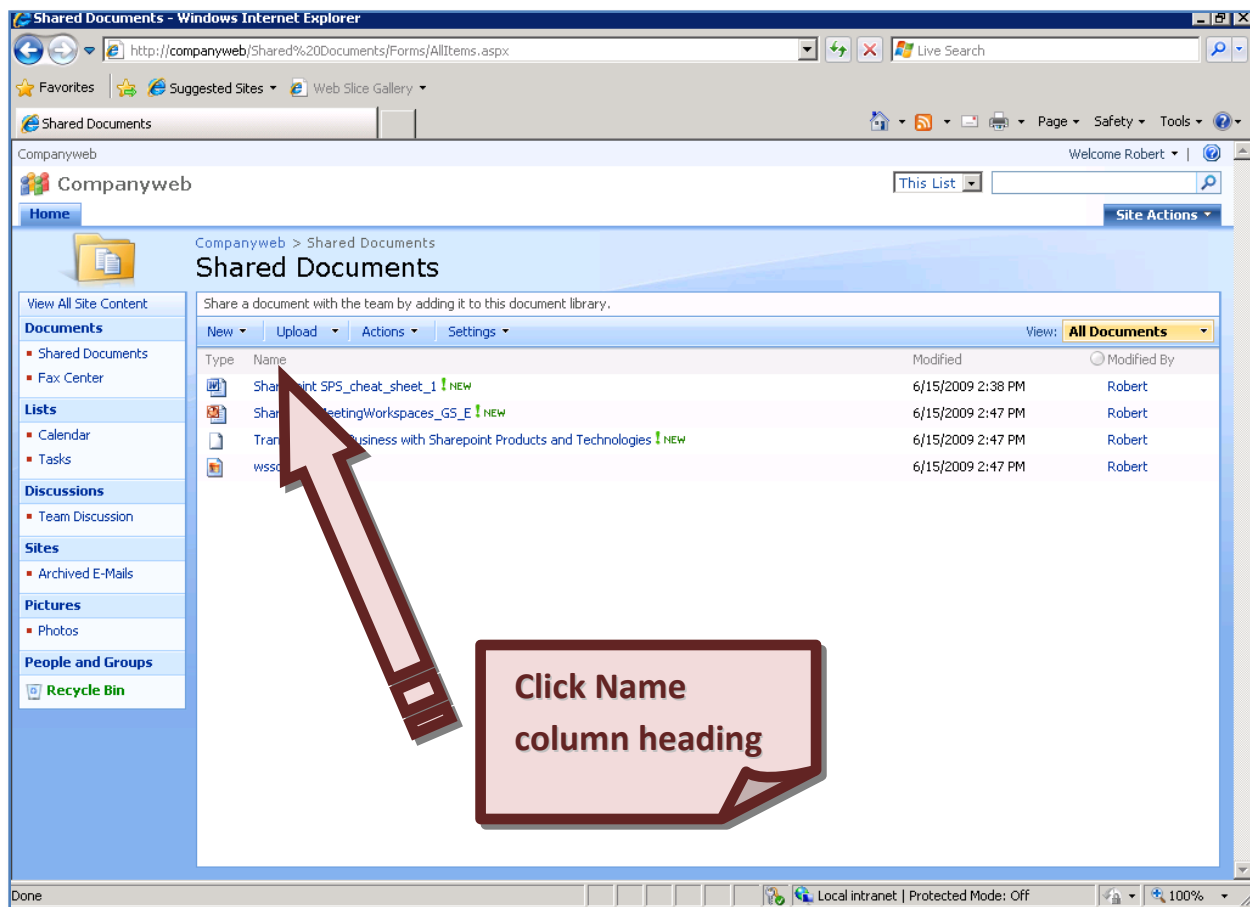
The next question you are probably going to ask is whether you can upload multiple documents at once. The answer is yes you can, however for this tutorial we will not cover that option. For further information on this topic look at the ***Where to go from here?*** section at the end.



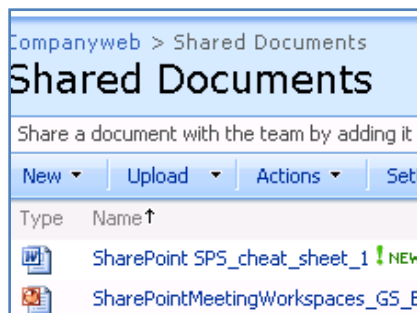
Once you have uploaded a few document into *Share Documents* your Document Library should look something similar to what's shown above.

You will notice that some files display an icon in the *Type* field (typically Microsoft Office documents) while others don't (in this case Acrobat PDF). It is possible to display icons for all the different file types however that requires some additional configuration. For further information on that topic look at the ***Where to go from here?*** section at the end.

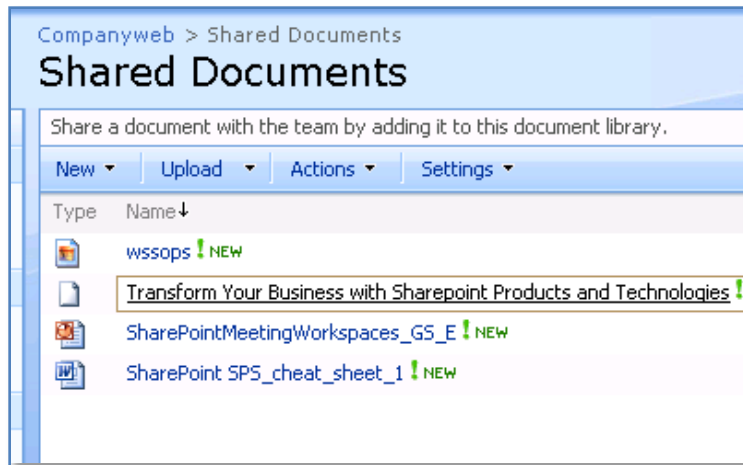
You may be wondering why using a SharePoint Document Library is any different from storing the file in folders on your local computer. Here are some examples of the added functionality that SharePoint can provide.



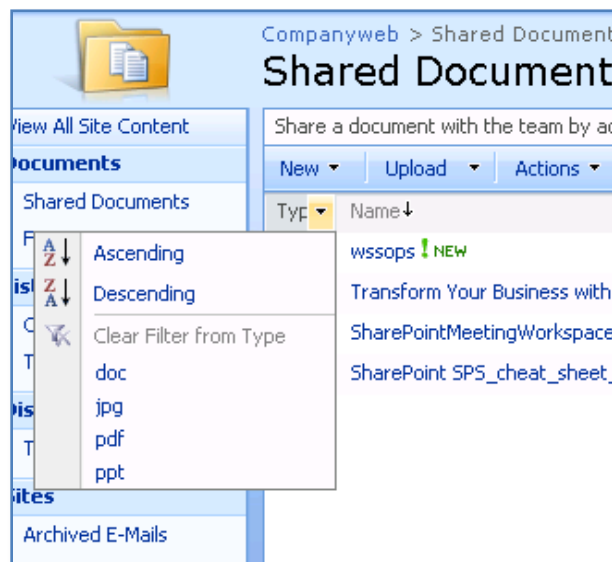
If you click once on the word *Name* in the column heading directly above the first file you uploaded you should see a small arrow appear to the right.



This indicates that the Document Library file list is sorted alphabetically from A to Z. If you click the *Name* field again you should see that the arrow now point down and the documents in the Document Library are arranged from Z through A.

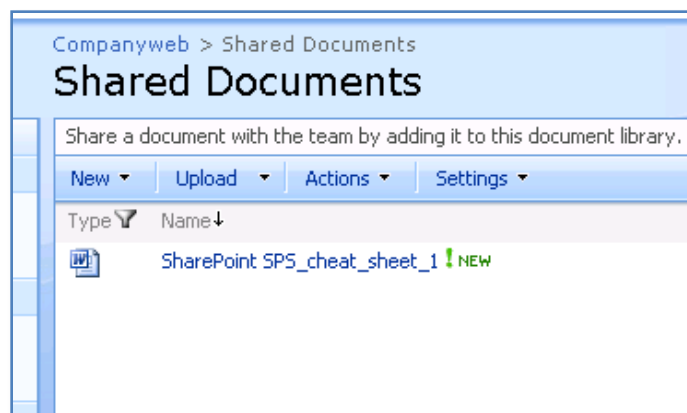


You can repeat this sorting process by clicking on any column heading.



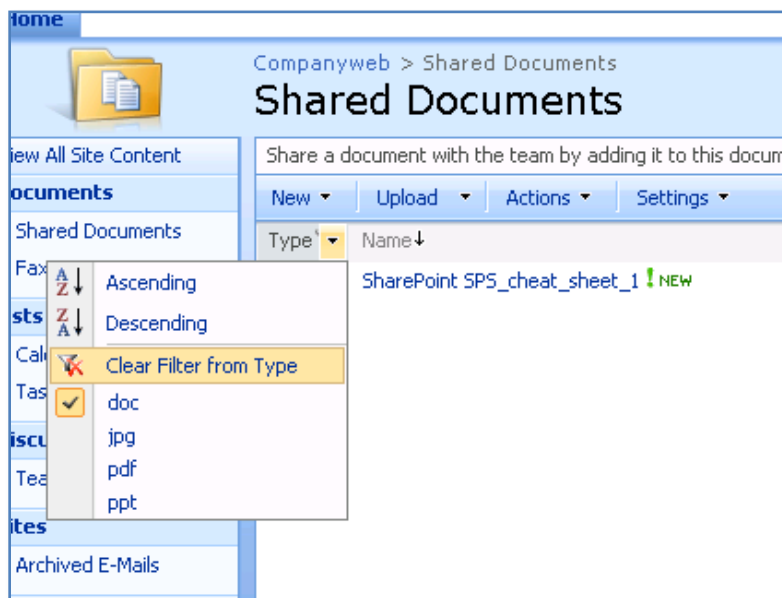
If you hover your mouse over the *Type* field heading a small triangle should appear to the right. If you now click that arrow, a drop down menu will appear as shown above.

Not only can you sort information in the SharePoint Document Library but you can also filter what you see. Select one of the document types (in this case we will select *doc*) from the menu that appears.

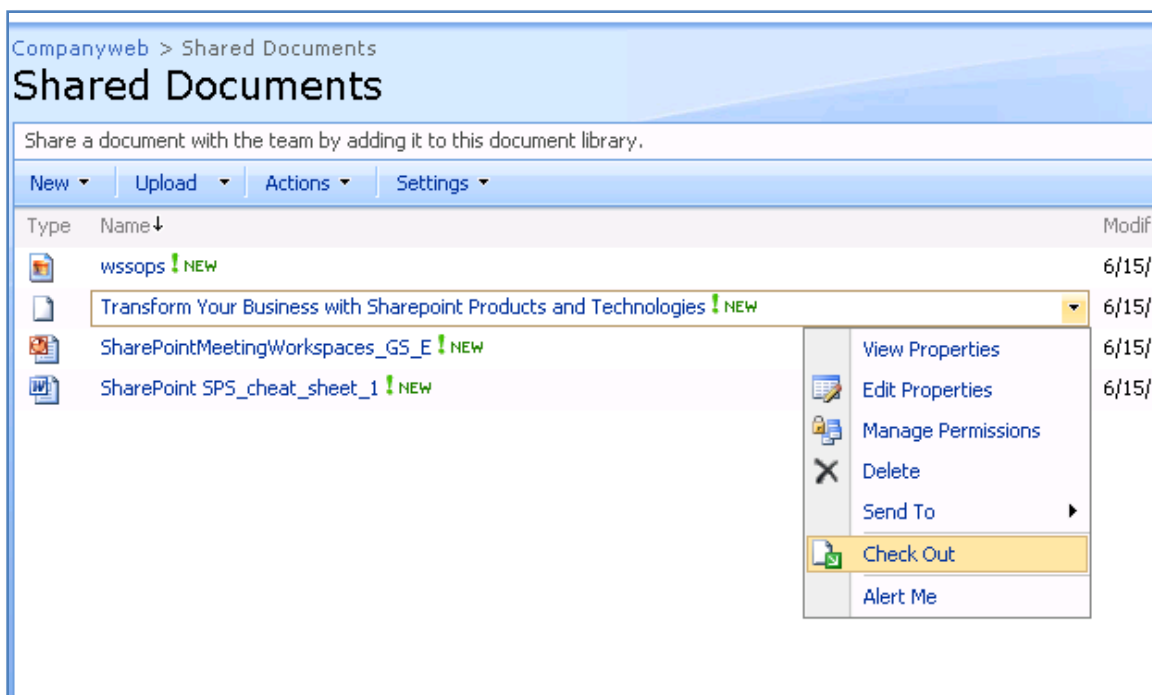


You should now find that only documents that match the type you just selected appear in the list (in this case only documents that are of type *doc*). You will also notice that a small filter symbol appears in the *Type* column heading. This indicates that a filter has been applied to this column telling you some of the information in the Document Library is being hidden. This now makes it extremely easy to locate documents of any type in your SharePoint Document Library.

This filtering can be applied to any individual as well as multiple columns. Imagine how much easier it would be to locate documents this way rather than simply using file folders stored on your local computer.

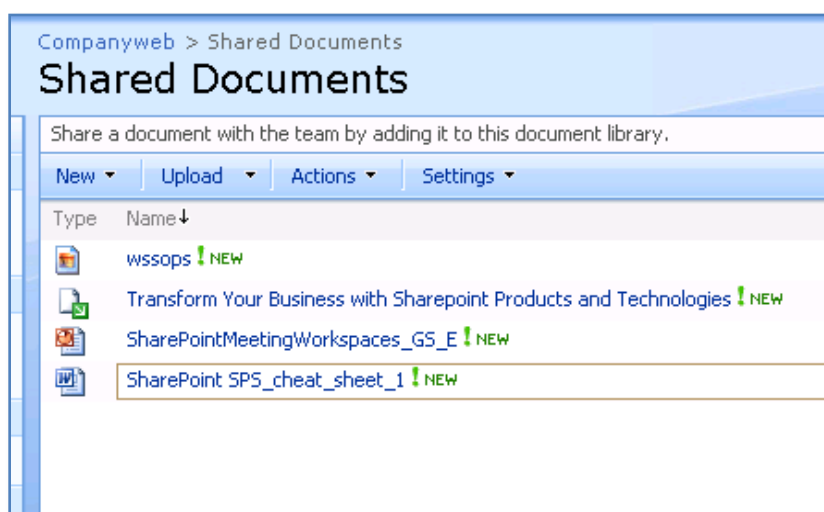


If you again hover over the *Type* heading and press the down arrow that appears, the menu will again appear. To clear the filter, simply select the option *Clear Filter from Type*. Once selected, your view will return to normal and all the documents in the Document Library again will be displayed.

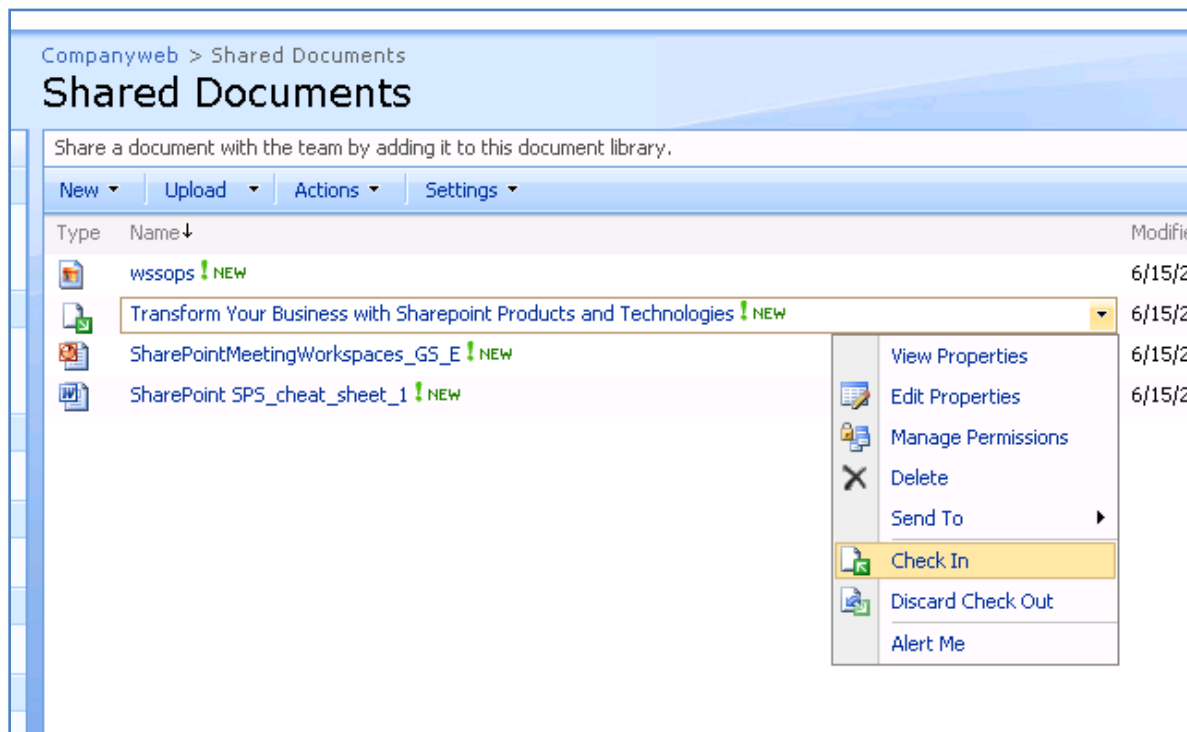


If you now hover your mouse over the name of any file in the Document Library you should see another down arrow appear to the right of the entry. Click on the arrow once to display the menu as shown above.

You will notice that an option called *Check Out* is displayed. This is because SharePoint can function as a basic document management system. By checking a document out the author is able to make changes but others are not. All they are able to do is view a read only copy until the file is checked back in. Go ahead and select the *Check Out* option from the menu.



Once the document is checked out you will now see it has a small green icon with an arrow in it on top of the normal *Type* icon. This indicates to SharePoint users that that document is currently checked out. As the person who checked the document out you are now free to make changes to the document. These changes will not be seen by other users until you check the document back in.



To check the document back into the Document Library simply hover over the file name entry again and click on the down arrow on the right of the file name when it appears. In this menu you will now see the option to *Check In*, select this.

Companyweb > Shared Documents > Transform Your Business with Sharepoint Products and Technologies > Check In

Check in

Use this page to check in a document that you have currently checked out.

Document Check In
Other users will not see your changes until you check in. Specify options for checking in this document.

Comments
Type comments describing what has changed in this version.

Keep the document checked out after checking in this version?
 Yes No

Comments:

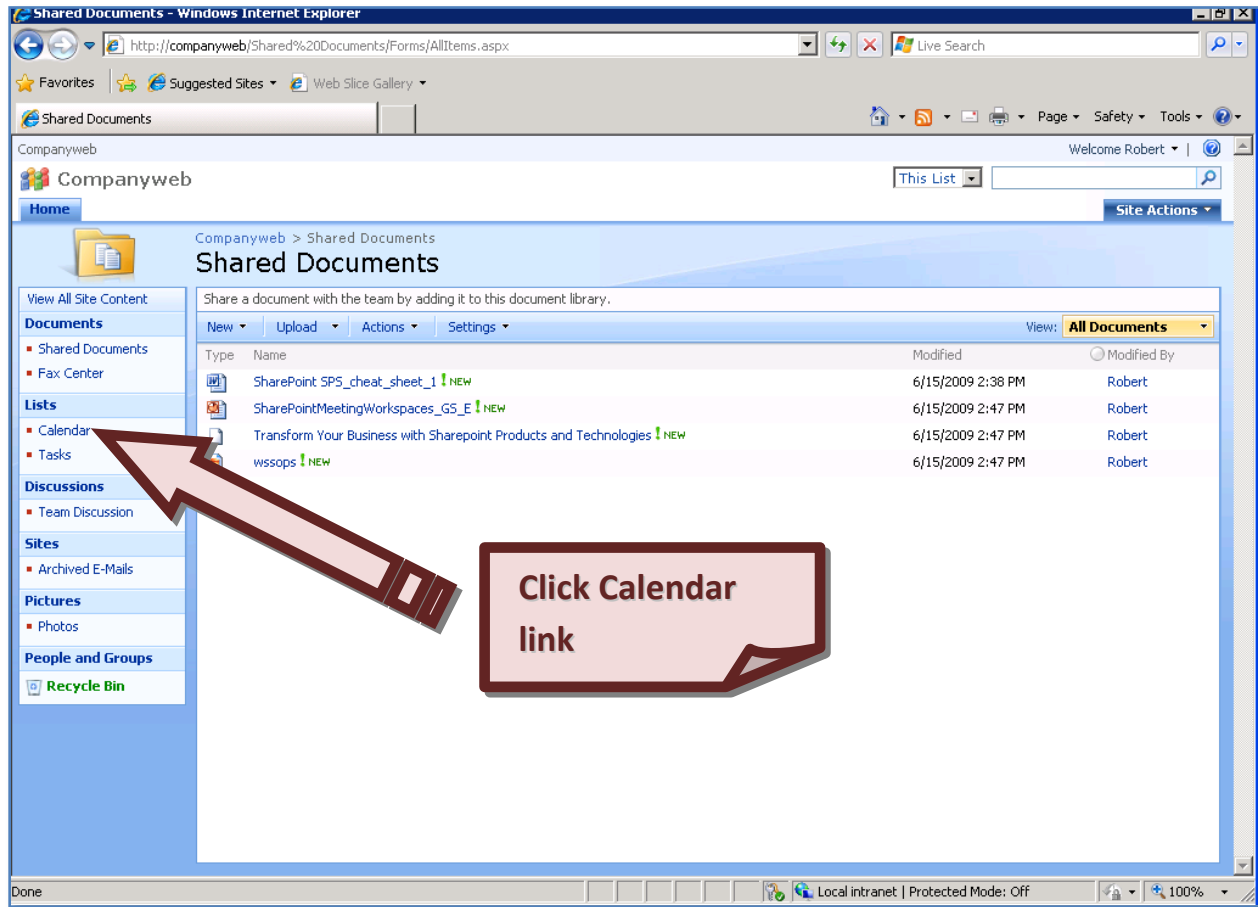
OK Cancel

Since you are checking the document back into the Document Library you are prompted to enter information about the changes that you made. You can also elect to leave the document checked out if you wish to work on it further. By providing optional comments you are creating an audit tracking train for that document that makes it easier for others to understand the changes you have made. Press the *OK* button when complete.

SharePoint also provides you with the ability to retain a version of each document you check into a Document Library. This means that you can easily roll back to a previous version if required. For further information on that topic look at the ***Where to go from here?*** section at the end.

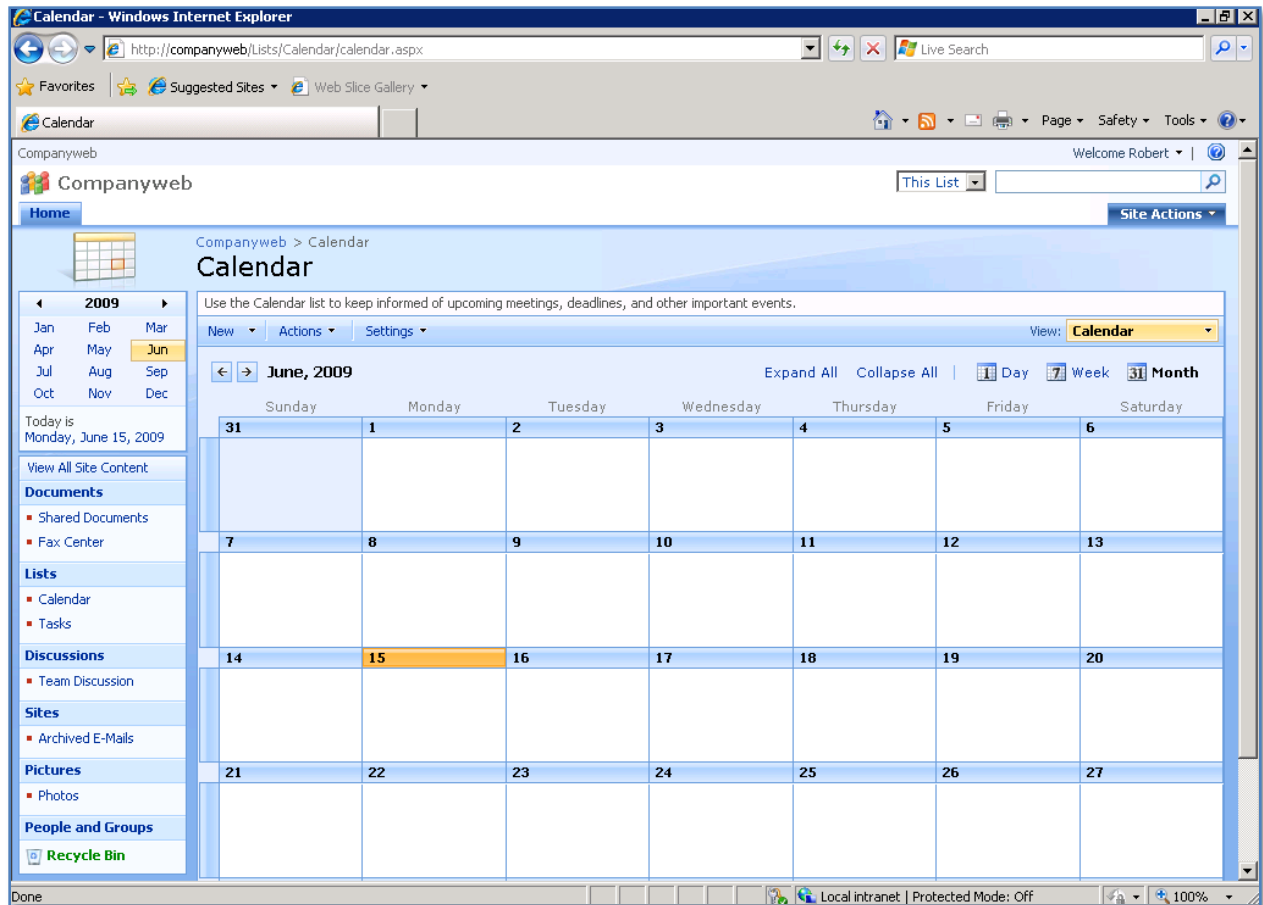
In summary, you should now be able to begin to understand some of the features of SharePoint Document Libraries that make them superior to normal folders on your local computer. There are many additional features of a SharePoint Document Library however for further information on that topic look at the ***Where to go from here?*** section at the end.

2. Calendar

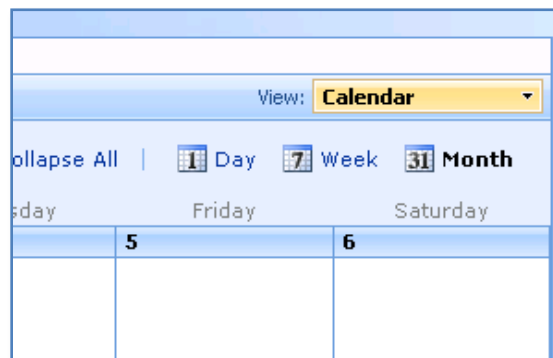


To move to the *Calendar* location in SharePoint simply click on the word *Calendar* in the *Quick Start Menu* on the left of the window as show above.

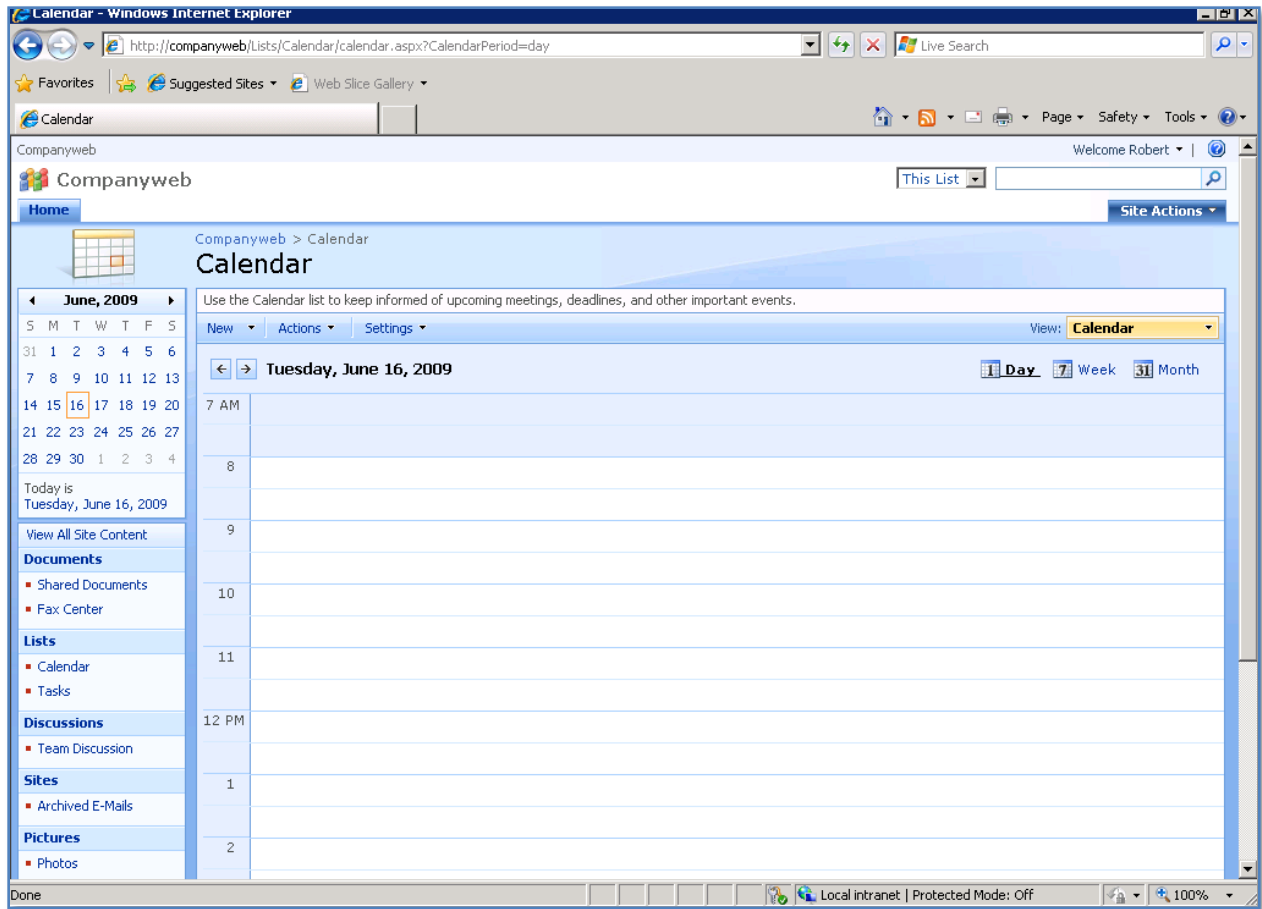
Once selected, you should now see a screen like the following:



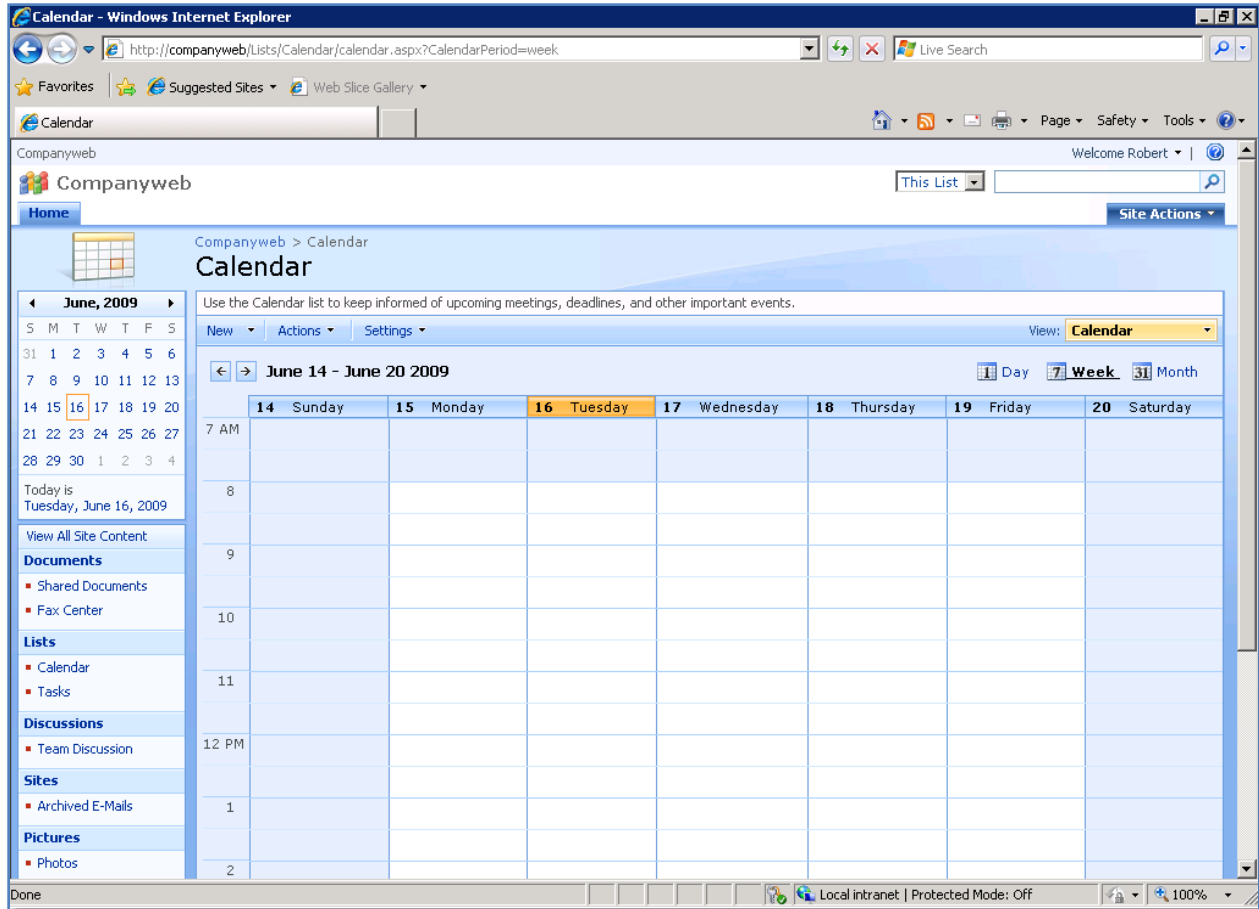
In the top right of the screen you will see three buttons, *Day*, *Week* and *Month*.



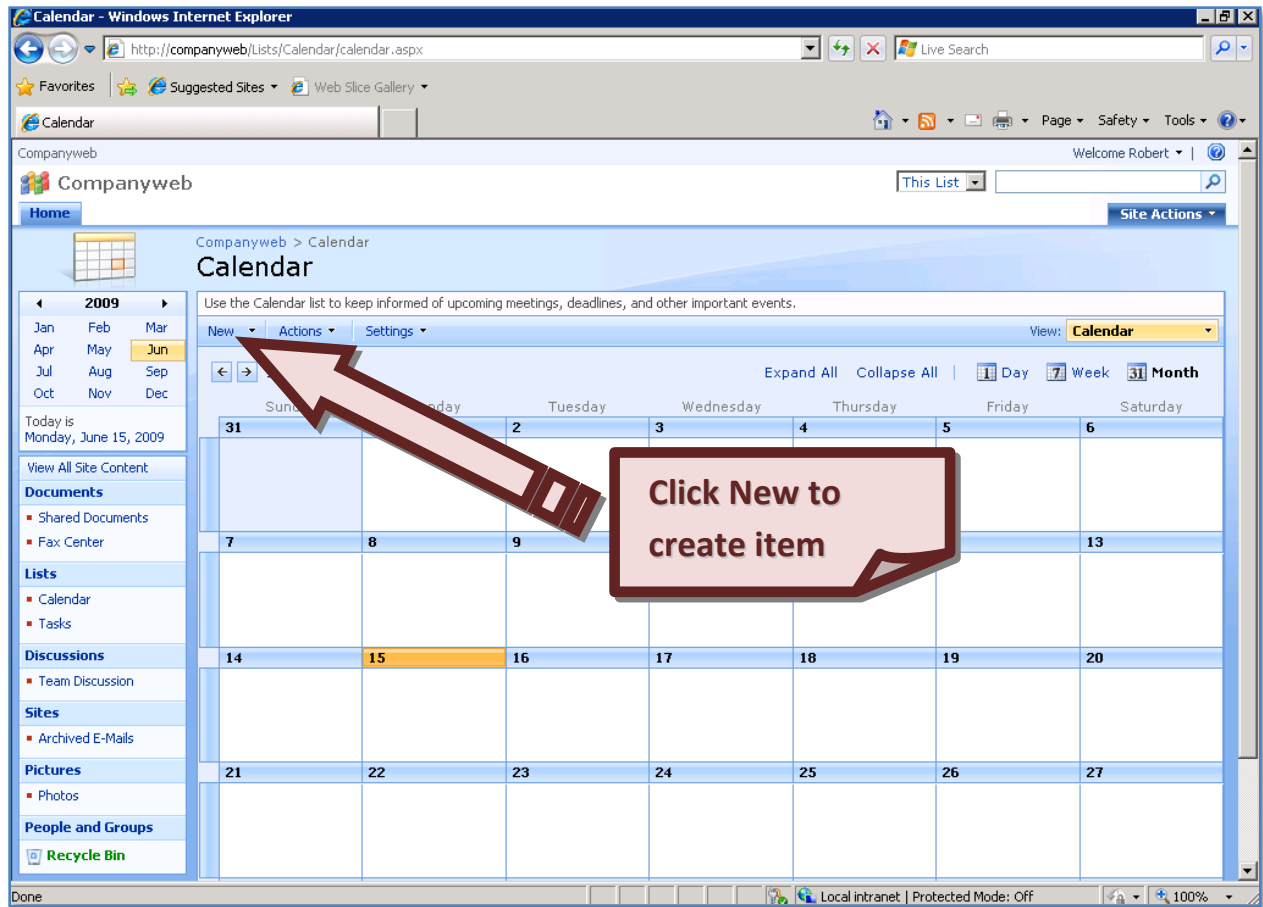
Clicking any one of these will change the range that the calendar displays. Clicking on *Day* will display something like:



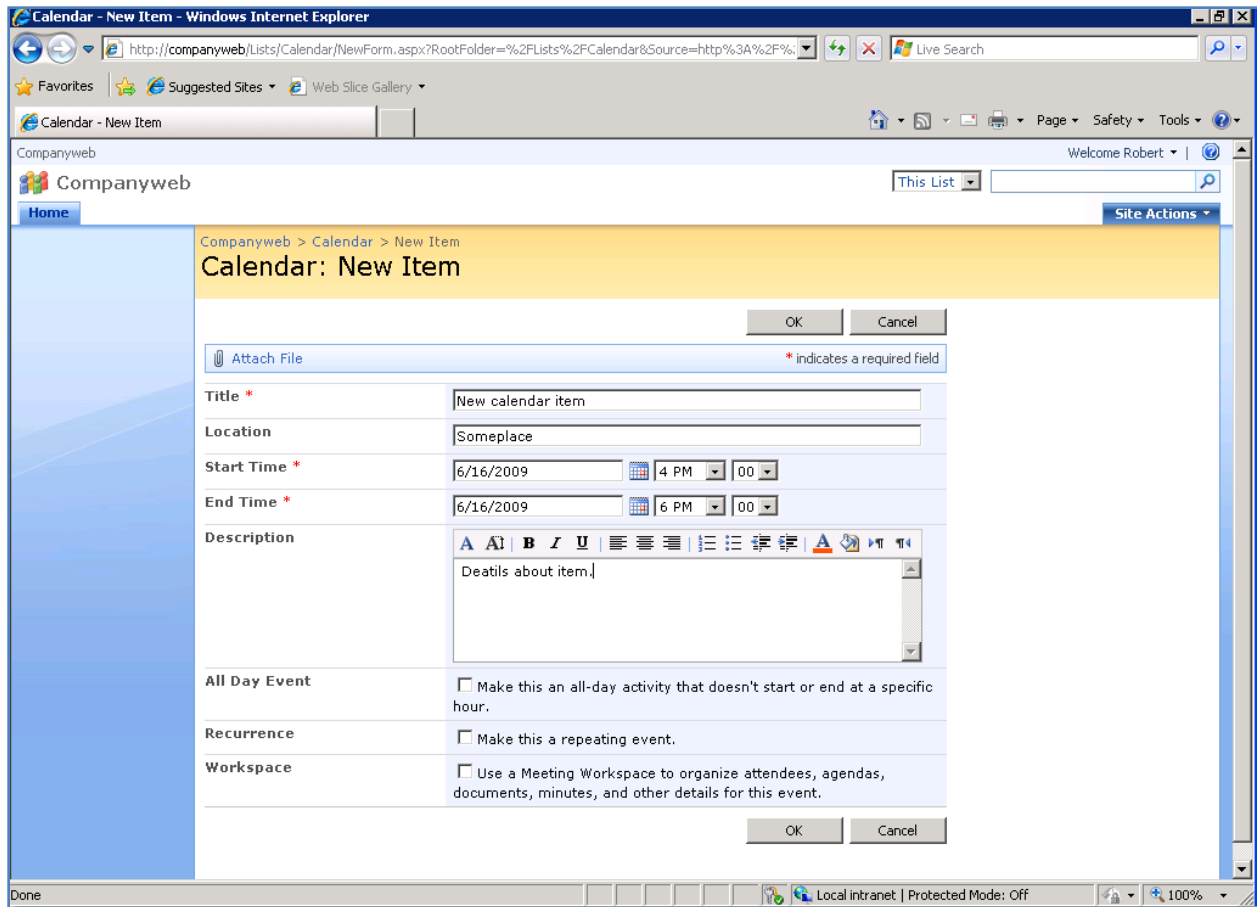
While clicking *Week* will display:



Click on *Month* to return the page to the original view.

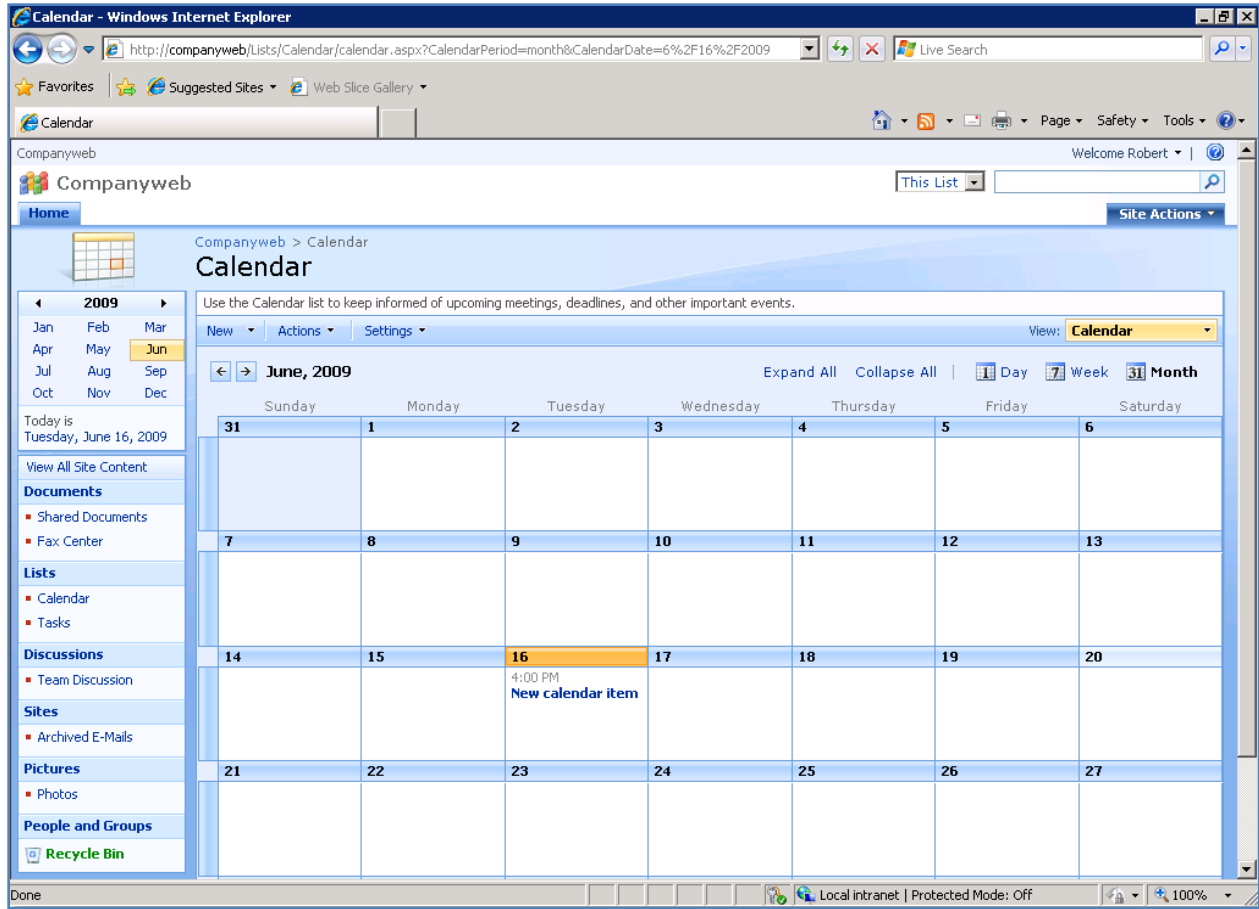


To create a new item in the calendar click the *New* button from the menu bar above the calendar.

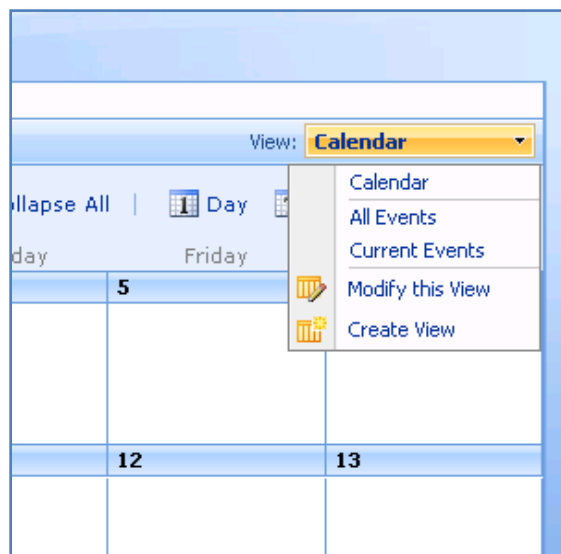


You are taken to a screen where you can now enter the details about the new calendar item, including whether it is an all day item or recurs.

When complete press the *OK* button to save the details.

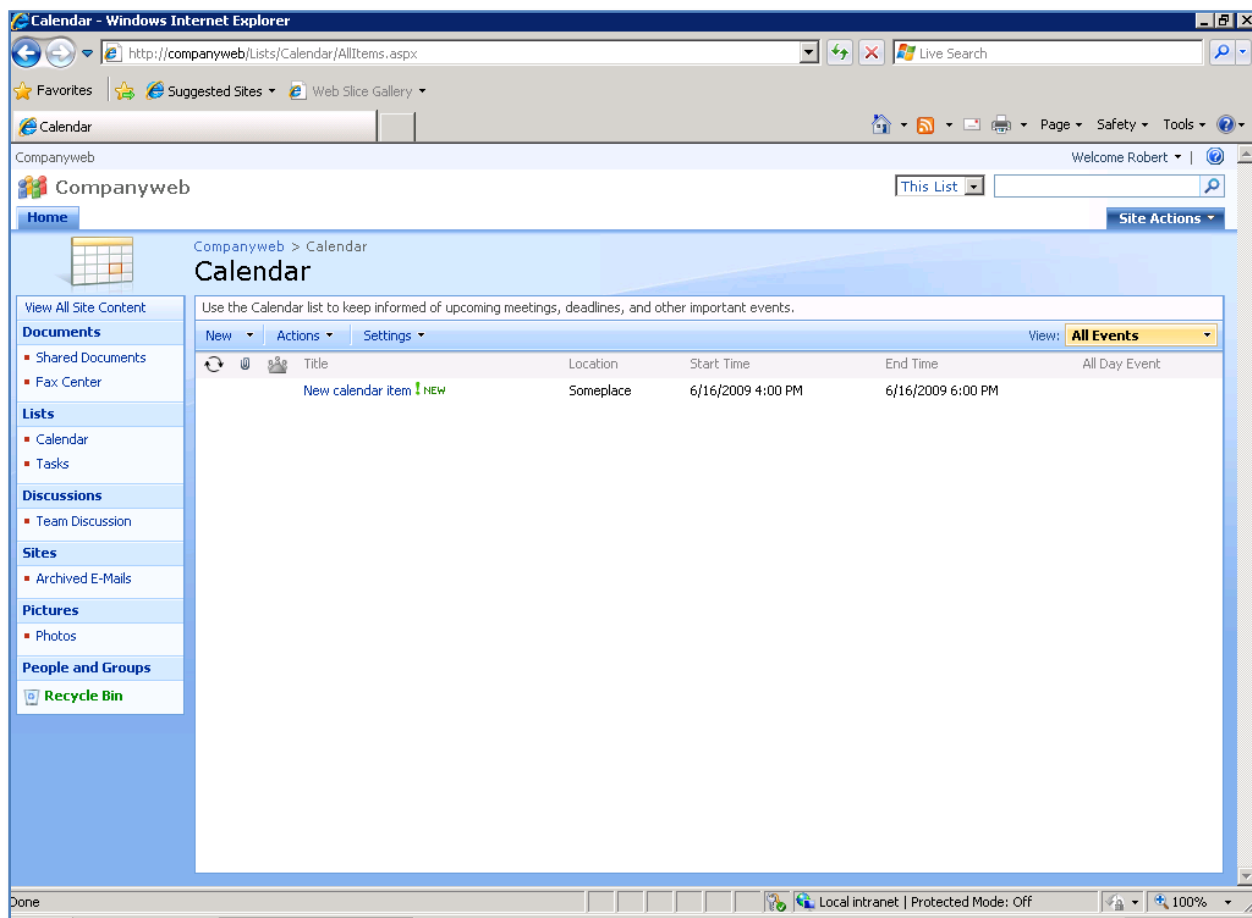


When you are returned to the full calendar view you should find your item displayed. Note, that item is now hyperlinked which means you can simply click on that item in future to bring up the details.



If you now select the *down arrow* that appears in the View area at the top right of the window just above the calendar you will see a list similar to that shown above. Most elements in SharePoint allow you to have different 'Views' of your data. This means that the underlying information remains the same just the way it is displayed changes.

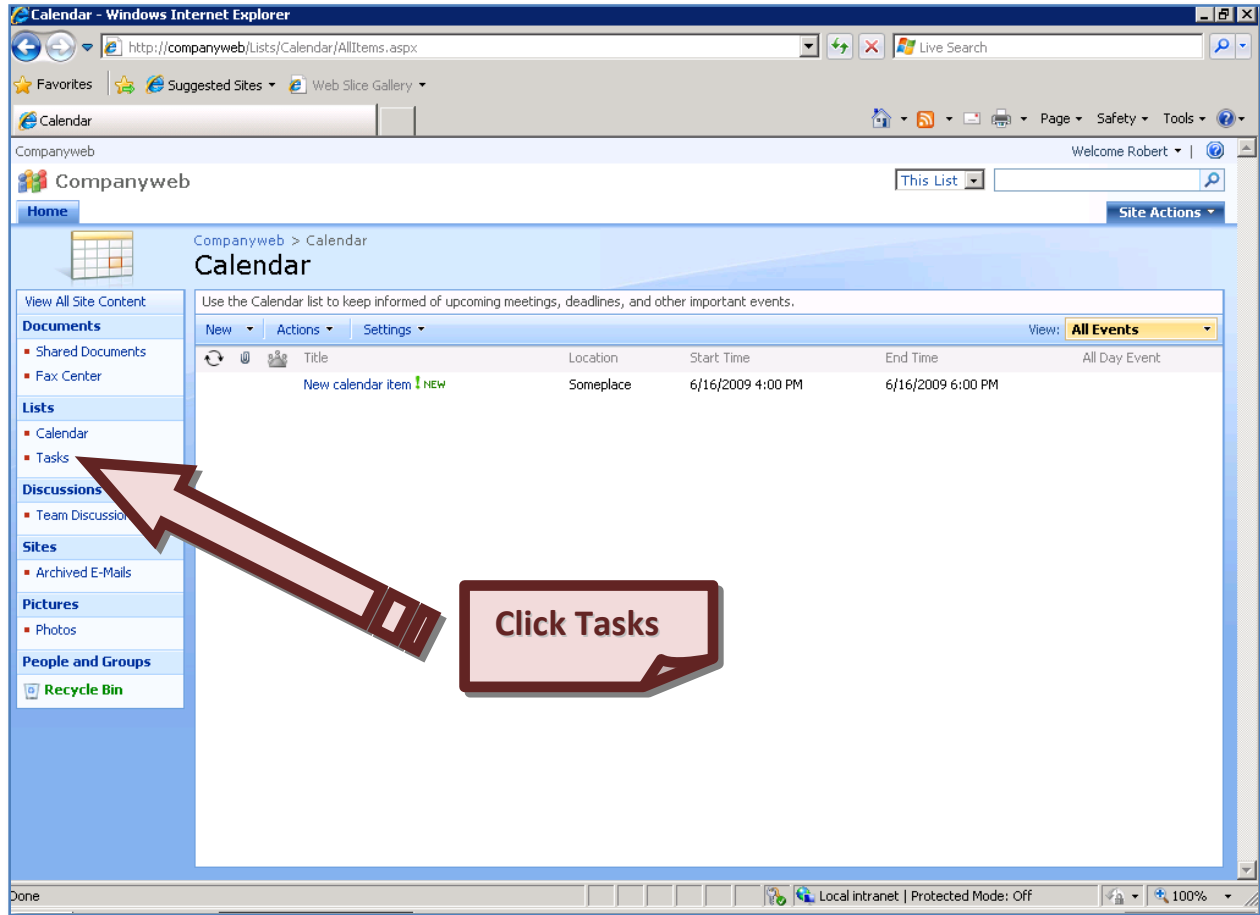
For example select the item *All Events* from the menu that appears, which should now display the calendar in this format:



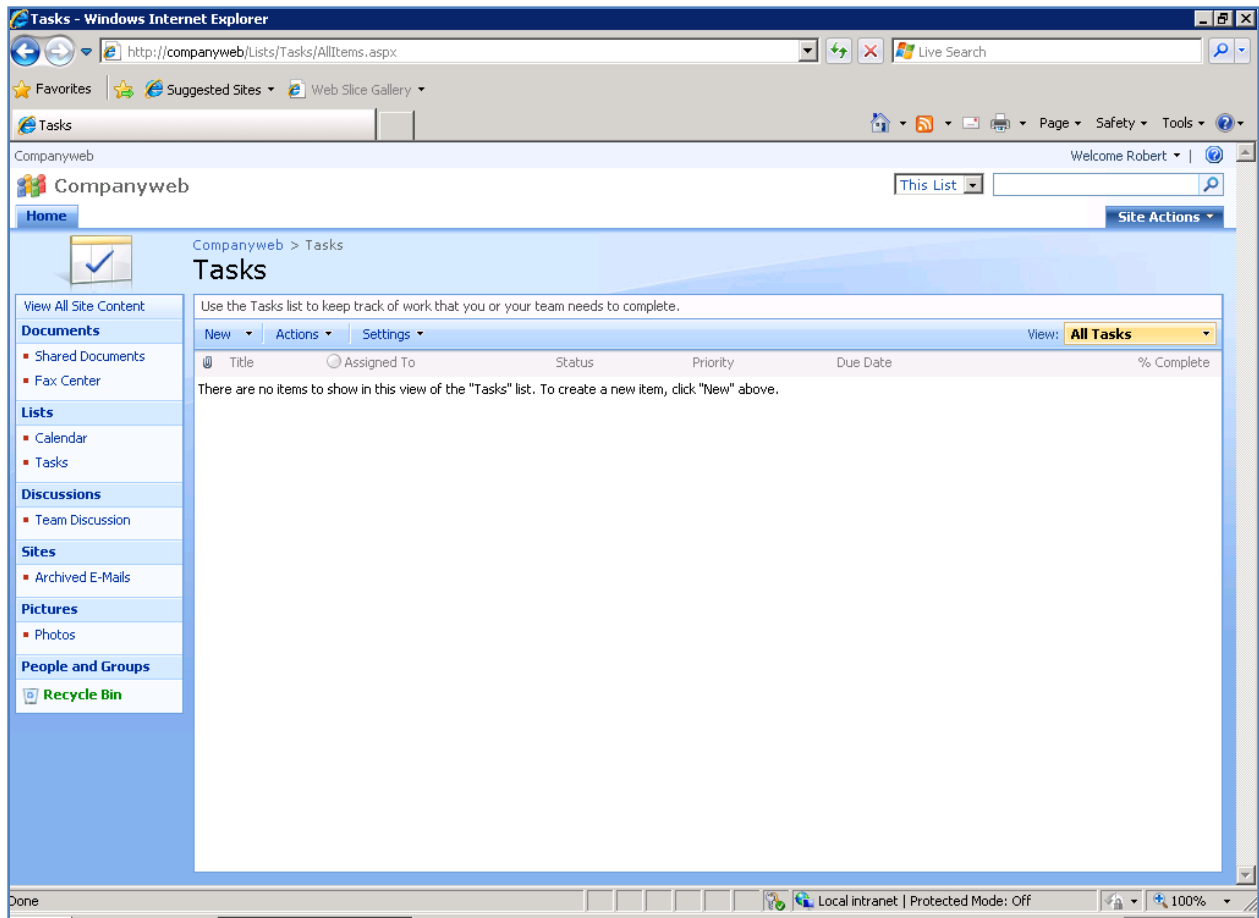
The *All Events View* displays the data in a similar format to Document Libraries. It is possible to create any number of different Views of your data for most elements in SharePoint. This makes it much easier for users to find exactly the information they are after.

You are also able to create as many different calendars as you desire within SharePoint. It is possible to link SharePoint calendars to Outlook so that information can easily be displayed in both locations. There are many additional features of a SharePoint calendars however for further information on that topic look at the ***Where to go from here?*** section at the end.

3. Tasks

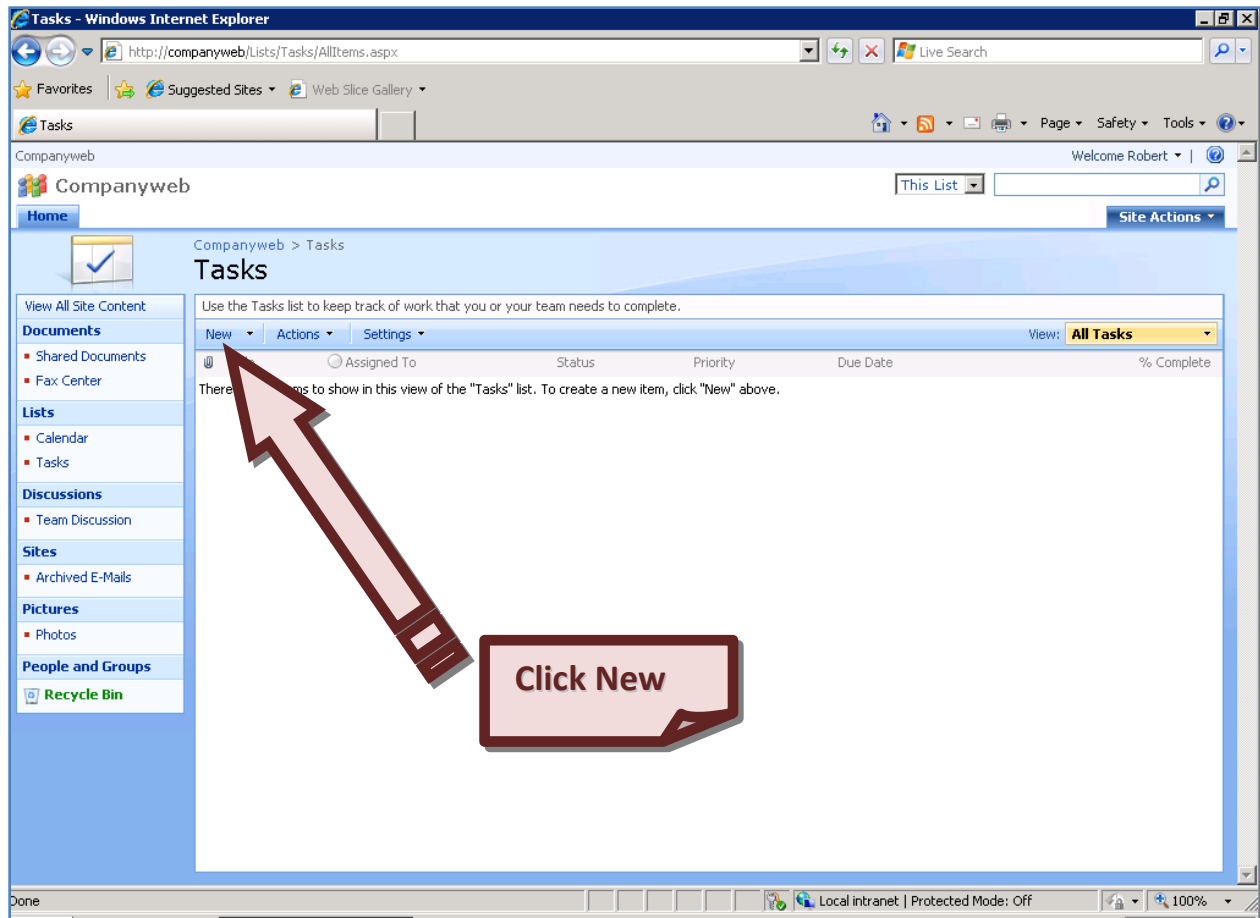


To move to the *Tasks* area click on the *Tasks* item on the *Quick Start Menu* on the left hand side of the menu.



Tasks is an area in which you can easily add information about To do items that are visible to all users.

To create a new *Task* item simply click on the *New* menu button as shown below.



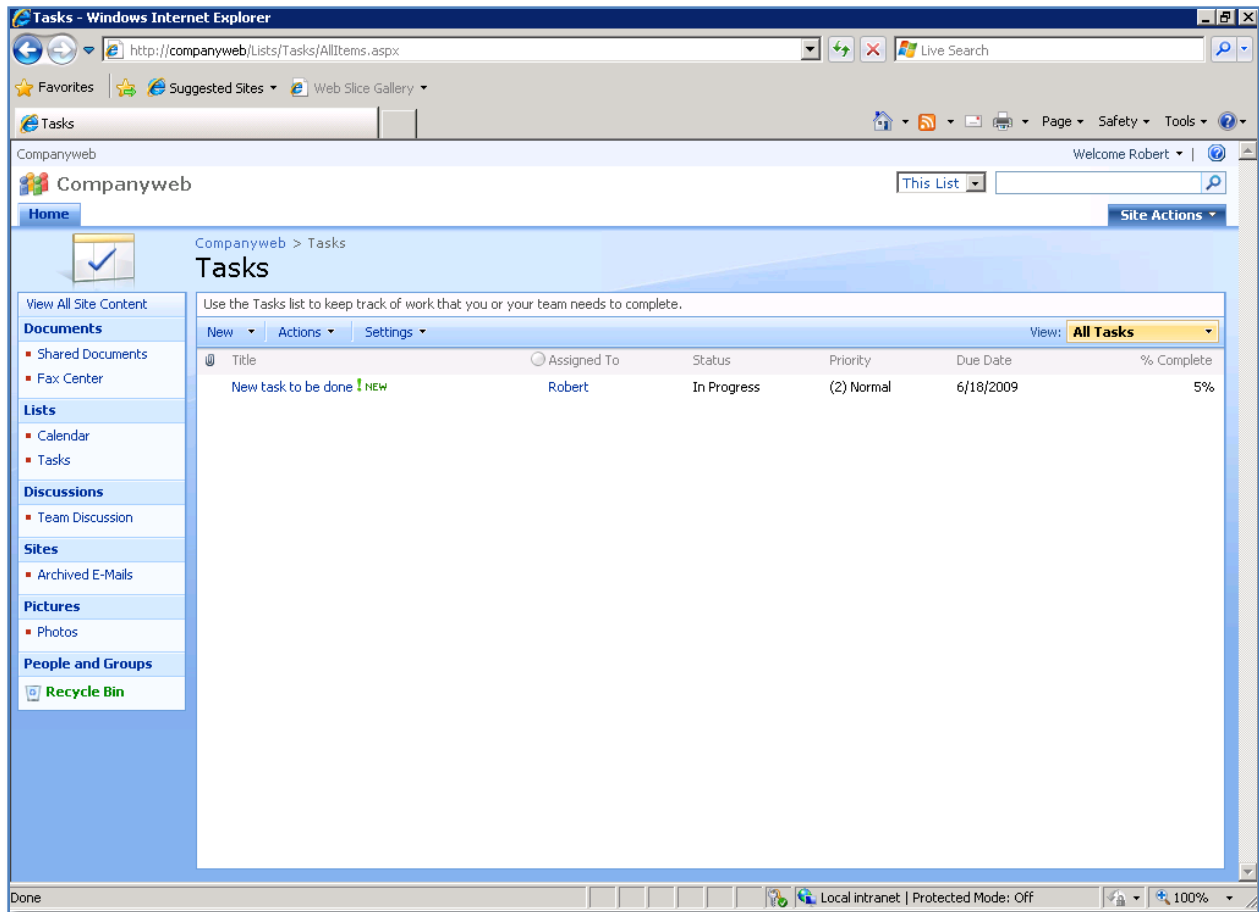
A new task item will now be displayed where you can enter information in about the task.

The screenshot shows a web browser window titled "Tasks - New Item - Windows Internet Explorer". The address bar shows the URL: <http://companyweb/lists/Tasks/NewForm.aspx?RootFolder=%2FLists%2FTasks&Source=http%3A%2F%2Fcomj>. The page content includes a navigation bar with "Home" and "Site Actions" buttons. The main heading is "Tasks: New Item". Below the heading is a form with the following fields:

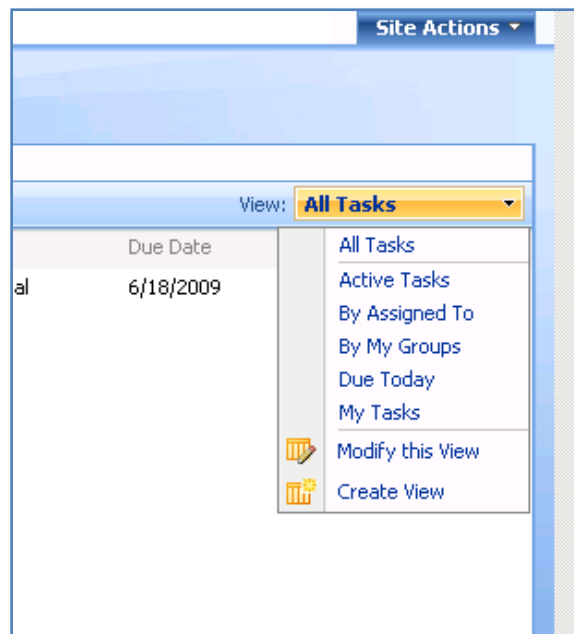
- Title ***: New task to be done
- Priority**: (2) Normal
- Status**: In Progress
- % Complete**: 5 %
- Assigned To**: Robert Crane
- Description**: Information about what needs to be done.
- Start Date**: 6/16/2009
- Due Date**: 6/18/2009

There are "Attach File" and "OK" buttons at the top and bottom of the form. A note indicates "* indicates a required field".

When you have completed entering information about the task press the *OK* button to save.

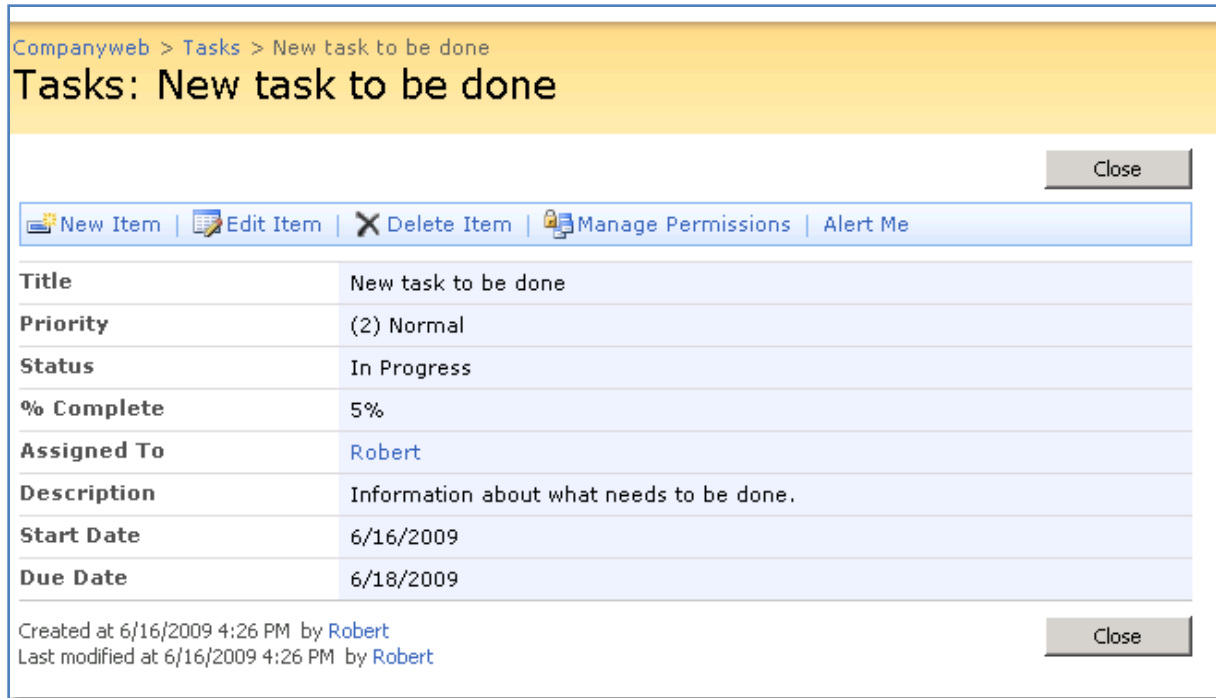


You will now see the task appear in the list. The listing appears similar to that in SharePoint Document Libraries.



As with most elements in SharePoint it is possible to use View to display the information in a different manner. You can see all the Views available in the *Tasks* area by clicking the down arrow next to *All Tasks* in the upper right of the window.

If you now click on the item name to display the entry you should see something similar to:



The screenshot shows a SharePoint task item view. At the top, there is a breadcrumb trail: "Companyweb > Tasks > New task to be done". Below this is a yellow header bar with the title "Tasks: New task to be done" and a "Close" button. A toolbar contains icons for "New Item", "Edit Item", "Delete Item", "Manage Permissions", and "Alert Me". The main content is a table with the following fields:

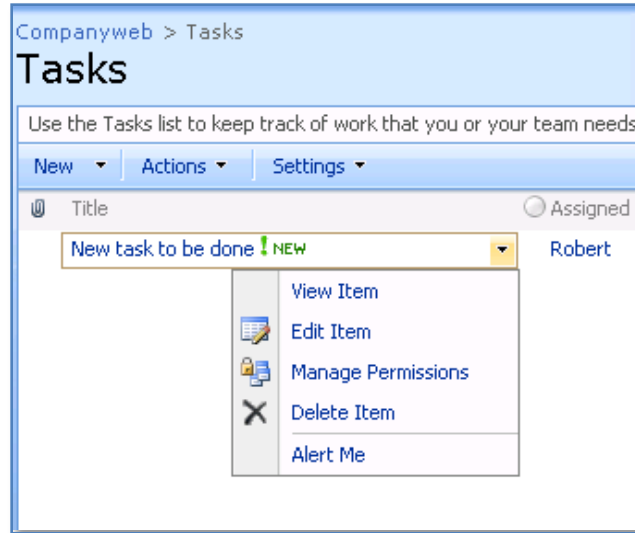
Title	New task to be done
Priority	(2) Normal
Status	In Progress
% Complete	5%
Assigned To	Robert
Description	Information about what needs to be done.
Start Date	6/16/2009
Due Date	6/18/2009

At the bottom, it shows the creation and modification details: "Created at 6/16/2009 4:26 PM by Robert" and "Last modified at 6/16/2009 4:26 PM by Robert". A second "Close" button is located in the bottom right corner.

From here you can *Edit* the task, change or add information. You can *Delete* the item so it no longer appears in the list and you can manage the *Permissions* on this item. This allows you to determine exactly which rights users have on this particular item including the ability to view, change and delete. Finally, you have an option to configure email Alerts about when changes occur with this item.

Most items in SharePoint have the ability to send email Alerts when information changes. These Alerts can be customized in their frequency and triggers. Alerts are configured on a per user basis to provide flexibility around what users receive Alerts about.

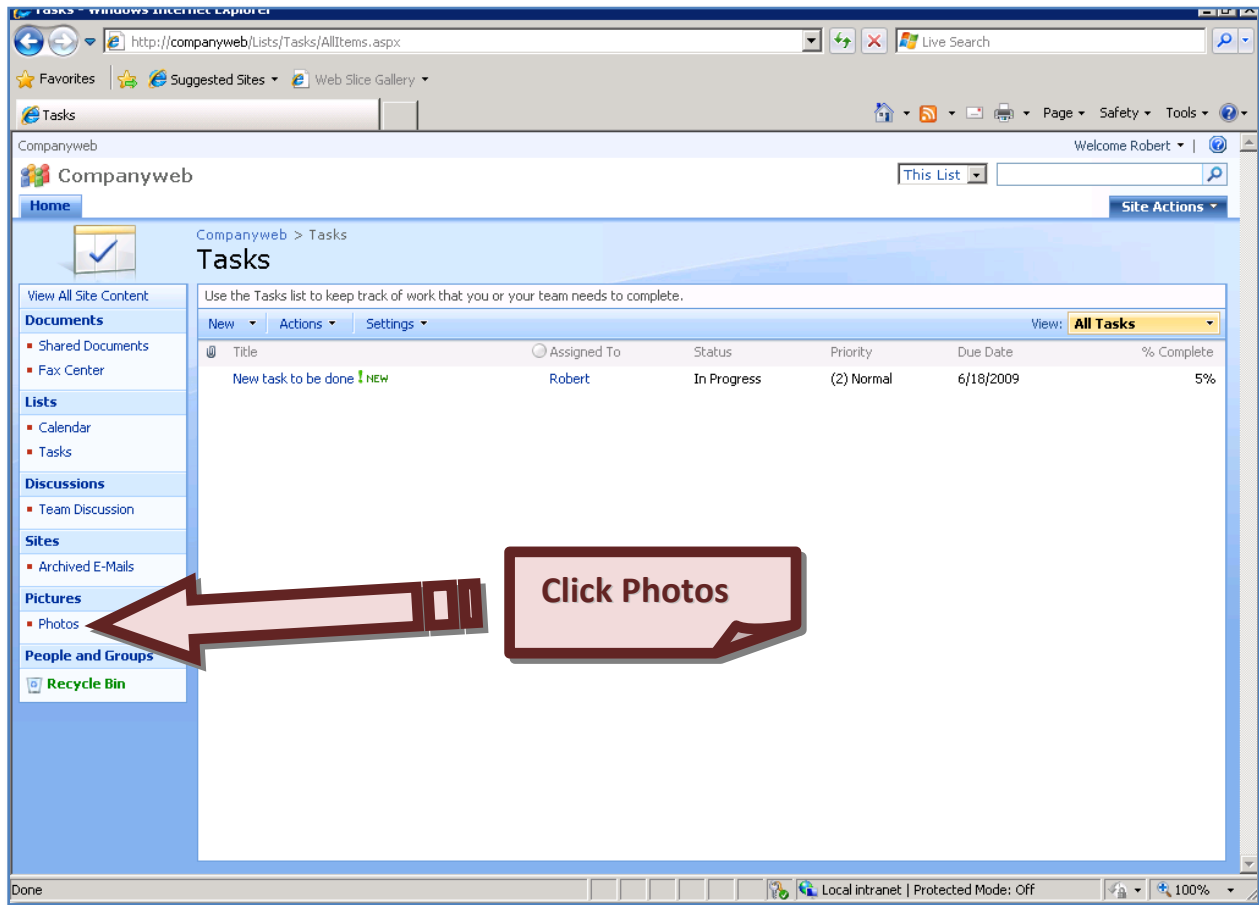
Press the *Close* button to exit the task.



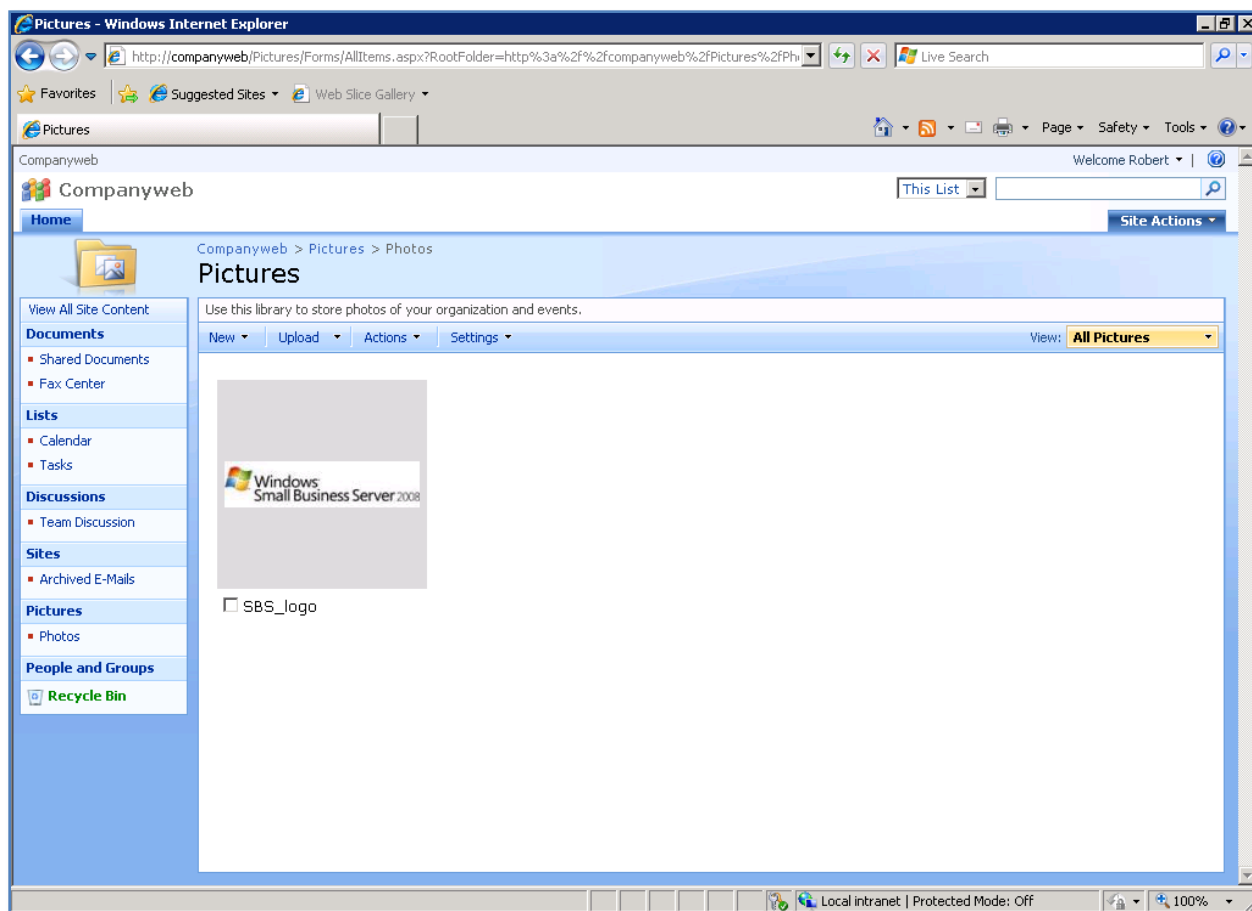
If you hover over the item in the list and select the down arrow that appears to the right of the field you will see that many of the items in the menu that is displayed are similar to those displayed when you actually click into the item.

As expected, it is possible to link these task items with those in Outlook. There are many other additional features of SharePoint tasks, however for further information on that topic look at the ***Where to go from here?*** section at the end.

4. Picture Libraries



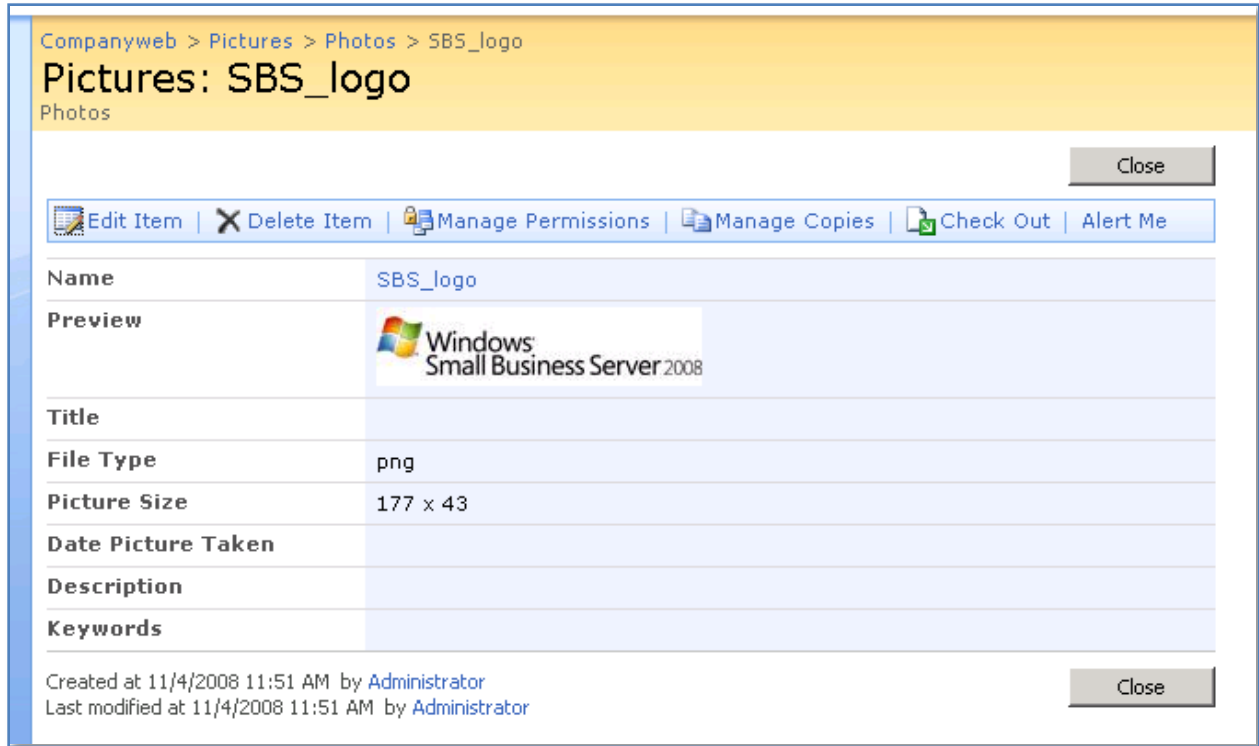
To move to the SharePoint Picture Library select *Photos* from the *Quick Start Menu* on the left as shown above.



Once clicked the screen should now appear like what is shown above.

SharePoint Picture Libraries are very much like Document Libraries, however they have a number of special features that makes them more suitable for cataloguing images. The first of which you can see above, that being a thumbnail view of the image.

Click on any image displayed.



As with the SharePoint *task* items you can now see more detailed information about the image. You will notice that it has two fields (that are currently empty) called *Description* and *Keywords*. Into these fields you can enter text information about the image that will make it easier to locate.


To edit the information about this image, click the *Edit Item* option from the menu bar.

Companyweb > Pictures > Photos > SBS_logo > Edit Item

Pictures: SBS_logo

OK Cancel

X Delete Item * indicates a required field

Name *	SBS_logo .png
Preview	
Title	
Date Picture Taken	<input type="text"/> 12 AM 00
Description	<input type="text"/> Used as alternative text for the picture.
Keywords	<input type="text"/> For example: scenery, mountains, trees, nature

Created at 11/4/2008 11:51 AM by Administrator
Last modified at 11/4/2008 11:51 AM by Administrator

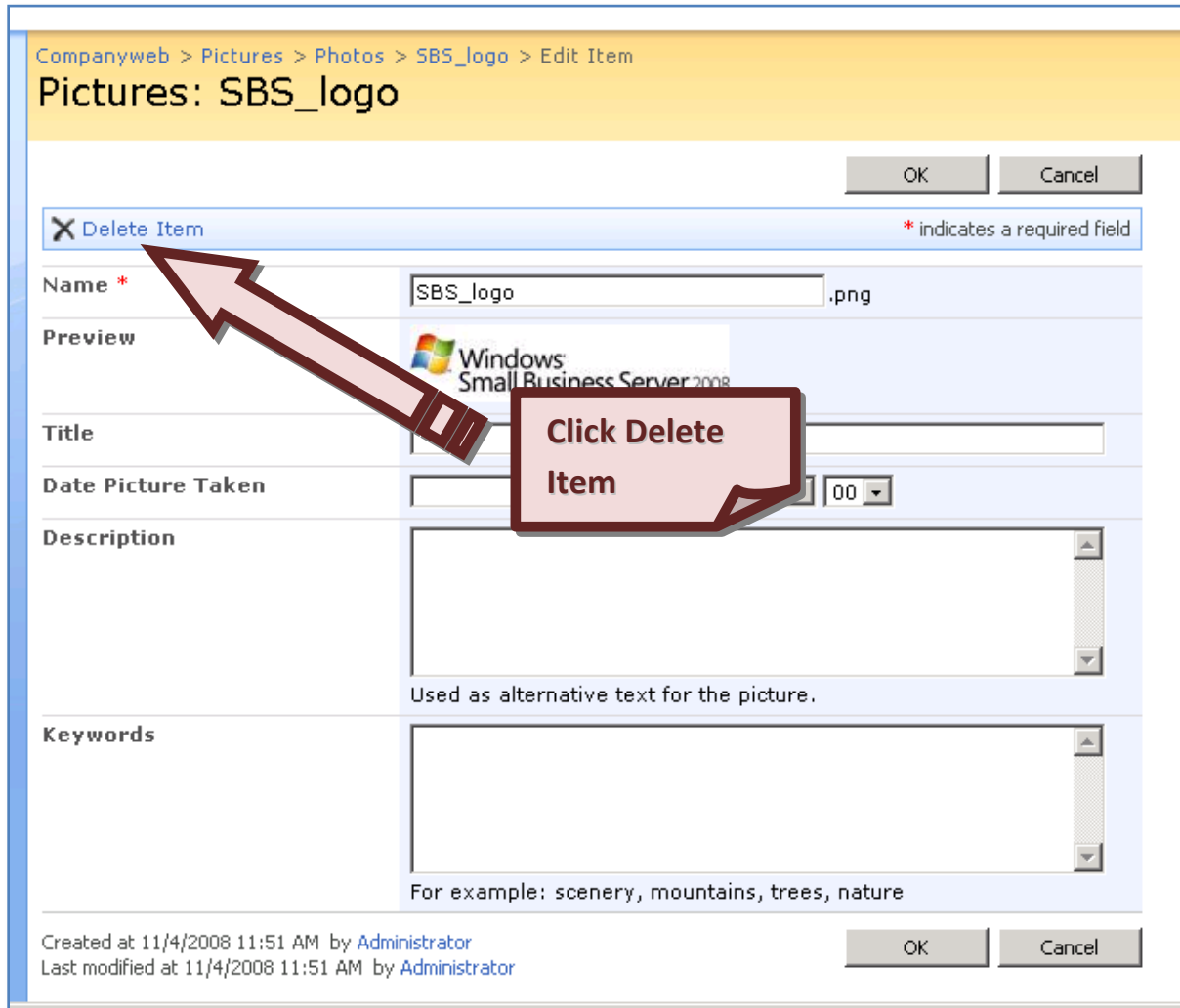
OK Cancel

You are now able to enter additional information into the selected fields. In this case you may give the image a suitable title and some descriptive keywords. When complete, simply press the *OK* button to save the information.

Much like SharePoint Document Libraries you can upload additional images to the Picture Library simply by using the *Upload* button from the menu bar. You can also change the View of the data by selecting from the available library Views in the upper right of the screen.

5. Recycle bin

If a user mistakenly deletes information it can be easily recovered from within SharePoint.

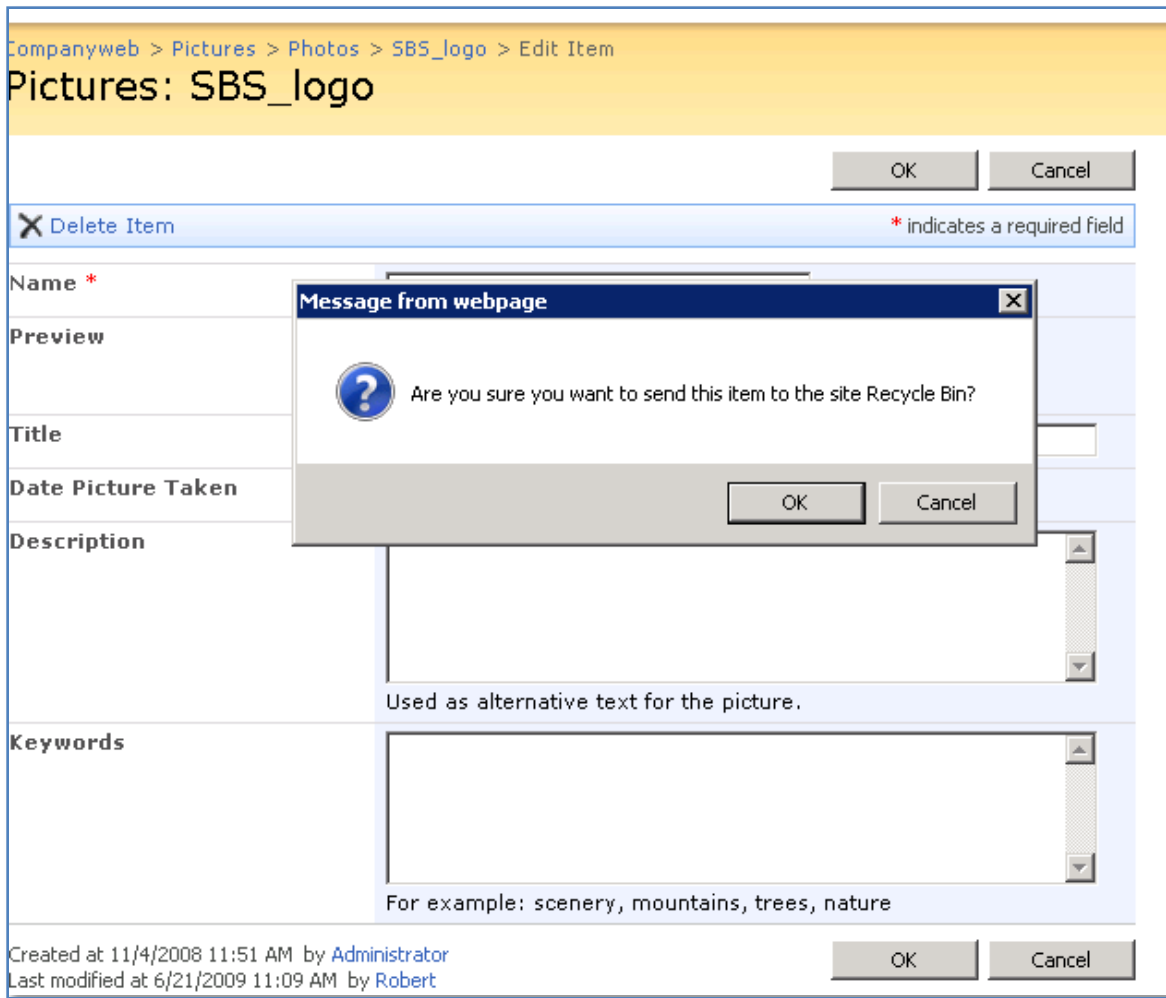


The screenshot shows the 'Delete Item' dialog box in SharePoint. The breadcrumb path is 'Companyweb > Pictures > Photos > SBS_logo > Edit Item'. The title of the dialog is 'Pictures: SBS_logo'. The dialog contains the following fields:

- Name ***: SBS_logo .png
- Preview**: A small image of the Windows Small Business Server 2008 logo.
- Title**: An empty text box.
- Date Picture Taken**: A date picker set to 00.
- Description**: A large text area with the placeholder text 'Used as alternative text for the picture.'
- Keywords**: A large text area with the placeholder text 'For example: scenery, mountains, trees, nature'.

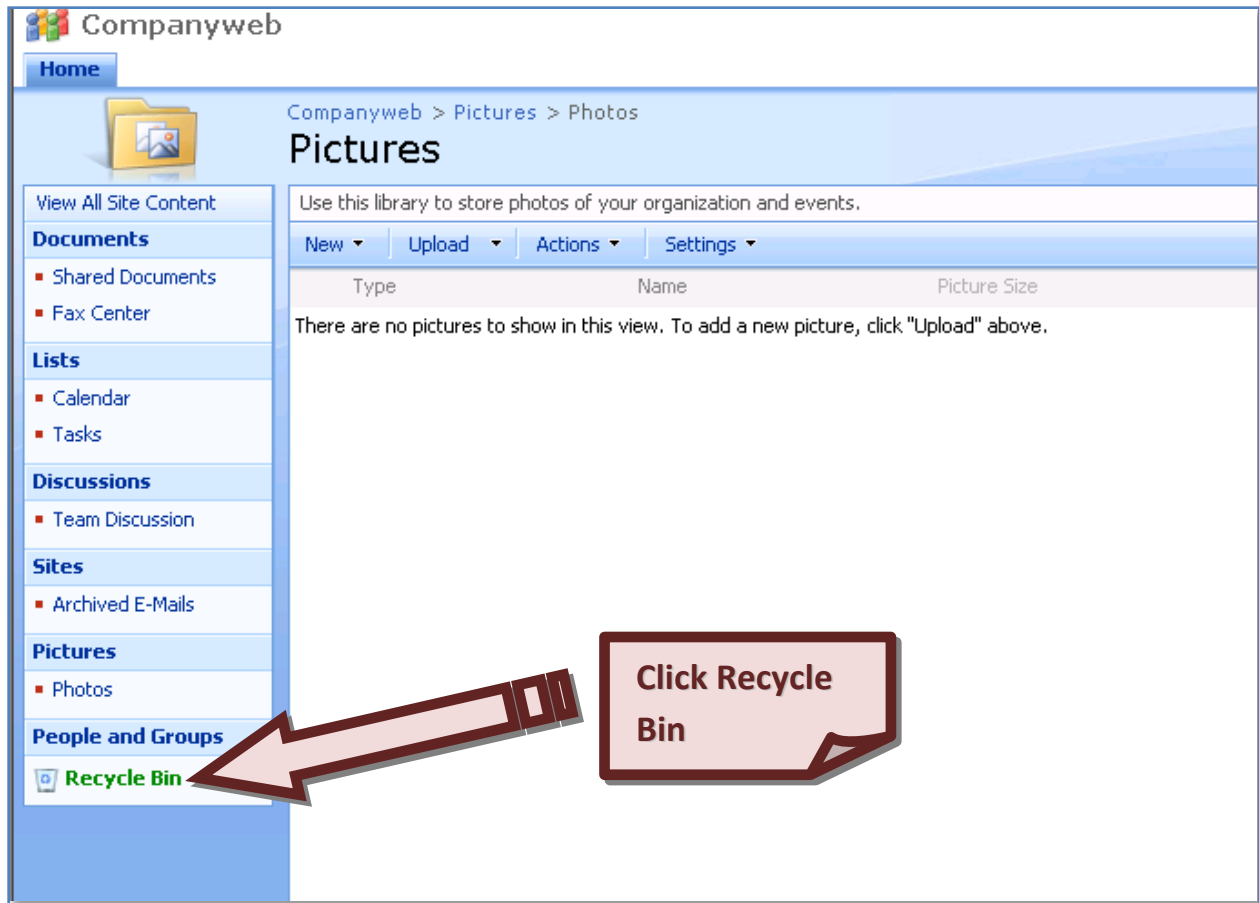
At the top left of the dialog is a close button with an 'X' icon and the text 'Delete Item'. At the top right are 'OK' and 'Cancel' buttons. A red callout box with a white border and a red arrow pointing to the 'Delete Item' button contains the text 'Click Delete Item'. At the bottom left, it shows 'Created at 11/4/2008 11:51 AM by Administrator' and 'Last modified at 11/4/2008 11:51 AM by Administrator'. At the bottom right are 'OK' and 'Cancel' buttons. A note '* indicates a required field' is located at the top right of the dialog.

With the SBS_logo item open click on the *Delete Item* from the top menu as shown above.

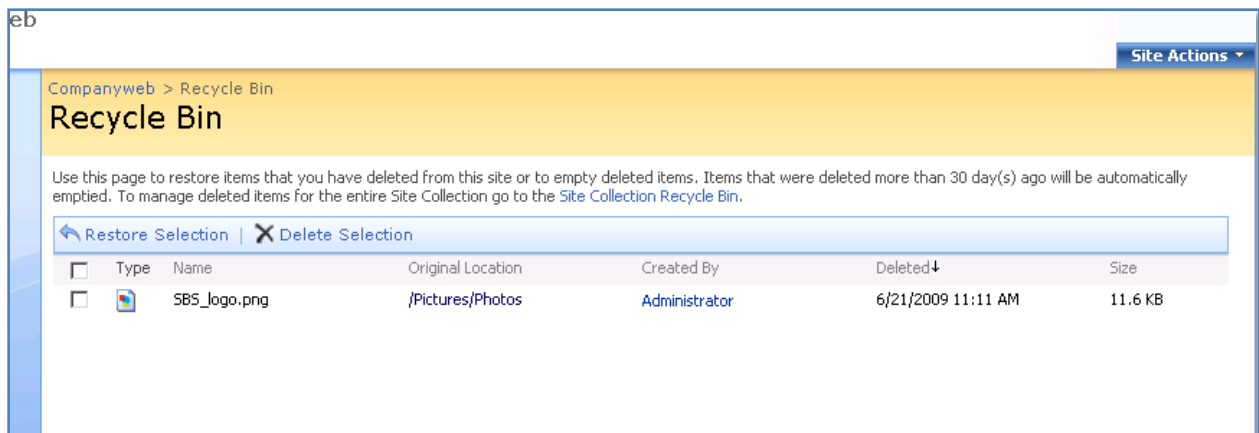


You'll be prompted as to whether you are sure you want to delete the item.

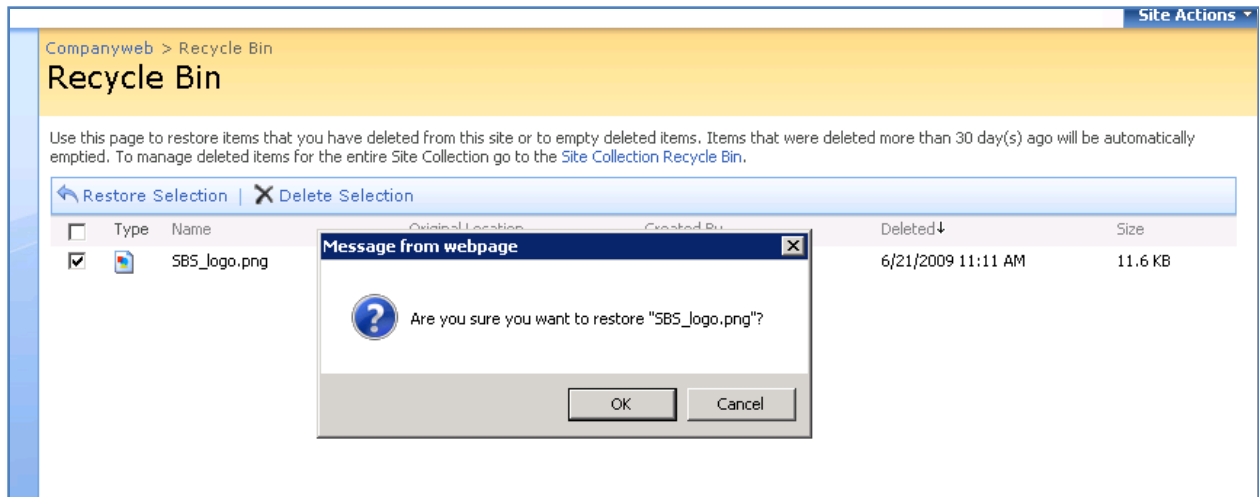
Select *OK* to continue.



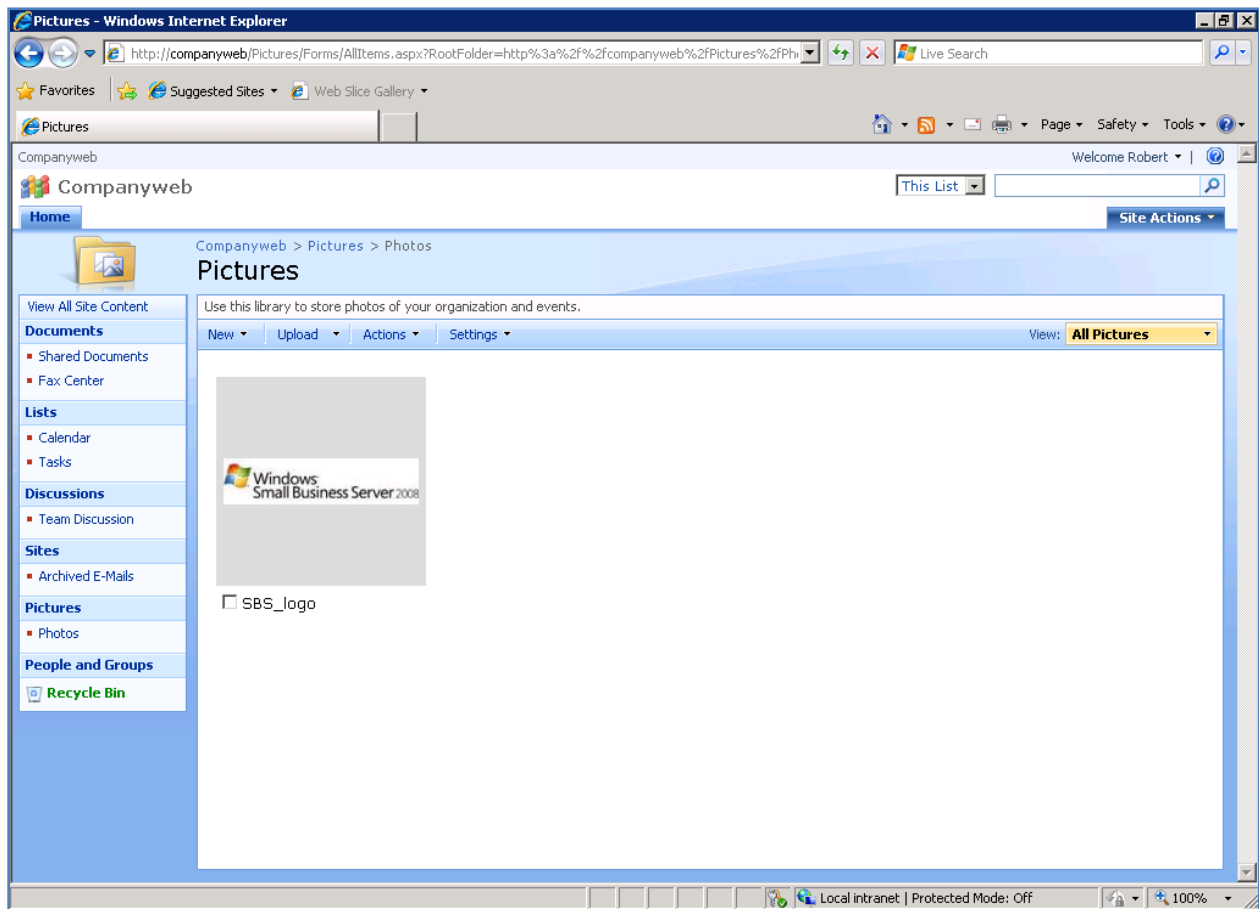
You should now see that the Picture Library is empty. Click on the *Recycle Bin* item in the bottom of the *Quick Start Menu* on the left.



In the *Recycle Bin* you should now see the image that was just deleted. To restore the item to its original location simply place a check next to the item and select *Restore Selection* from the menu.



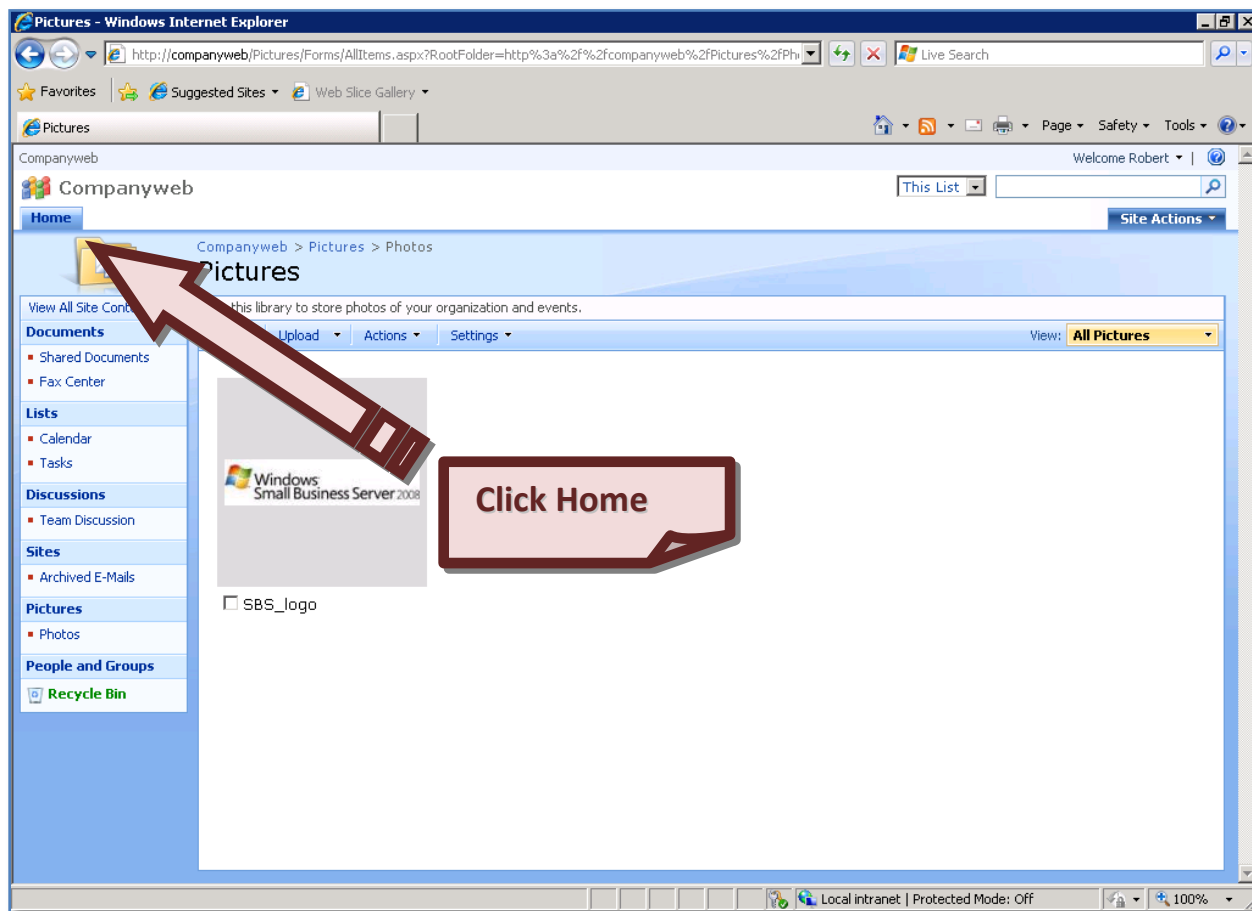
You will be prompted as to whether you wish to restore the item. Select *OK* to continue.



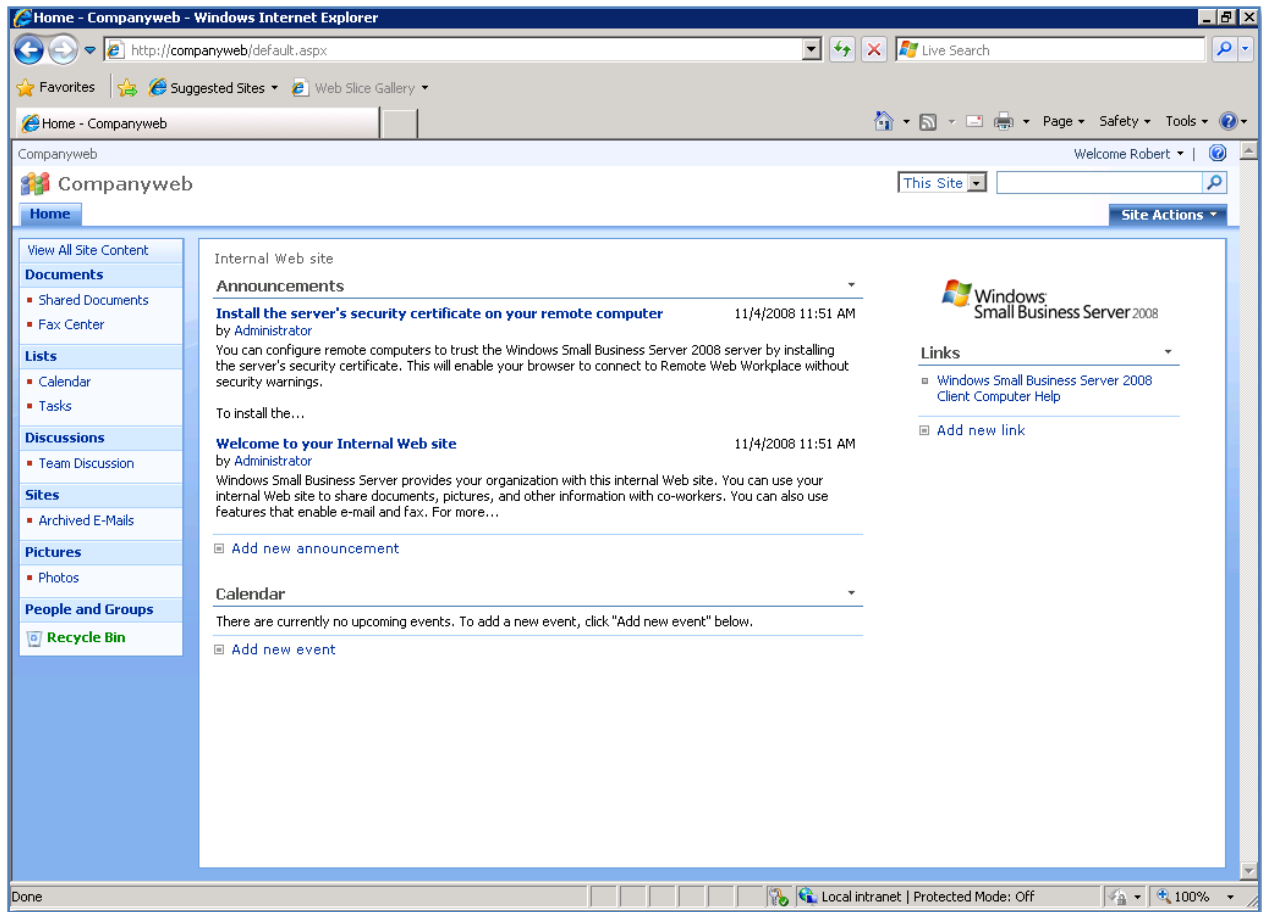
If you now return to the Picture Library by selecting the *Home* tab in the top left and then *Photos* from the *Quick Start Menu* you will see that the item has been restored to its original location.

SharePoint actually has two recycle bins. The first is the one shown above, available for every user. The second is one that is accessible only by administrators. If an item is deleted from the users Recycle Bin it can still be recovered from the administrators Recycle Bin. SharePoint therefore has dual layers of protection against any item being mistakenly deleted.

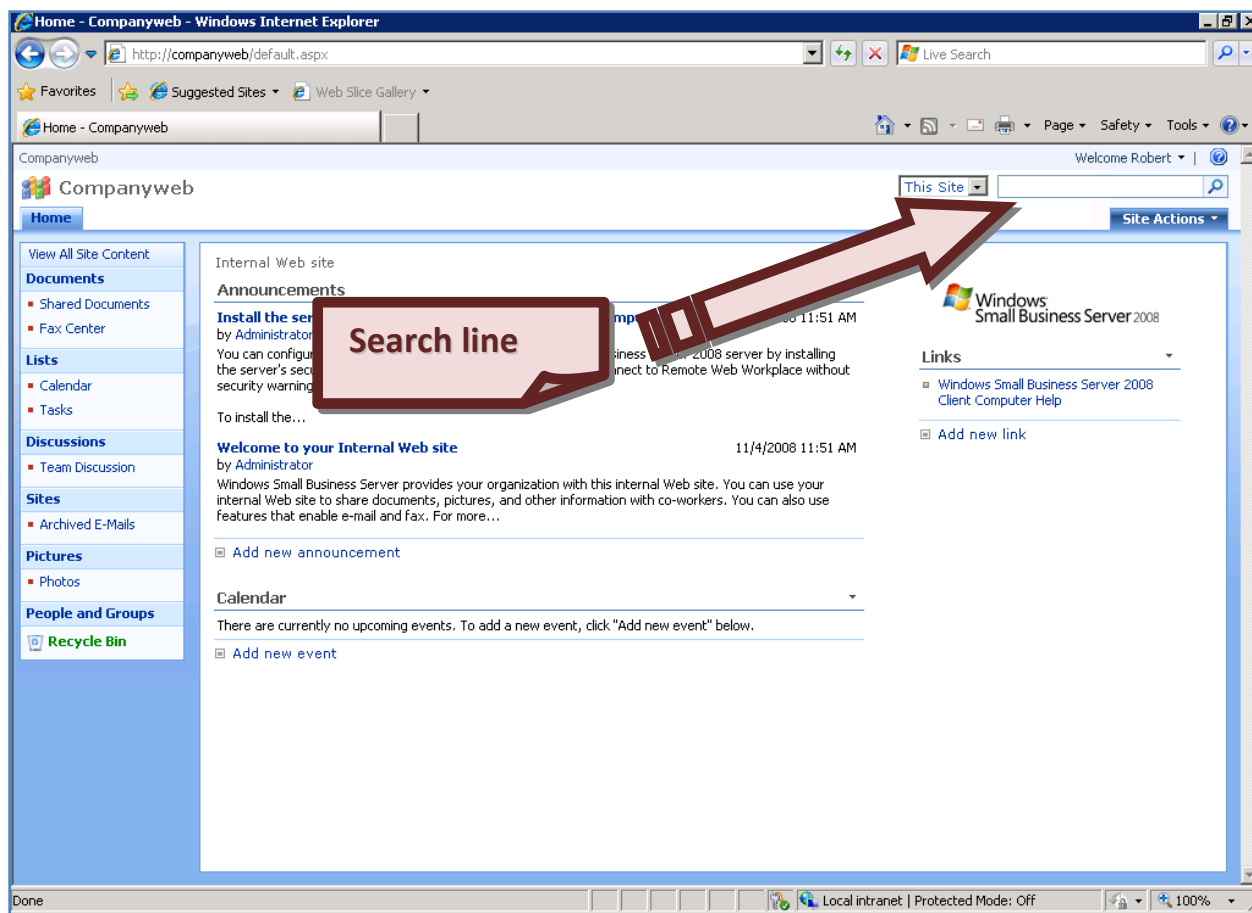
6. Search



Click on the *Home* tab in the upper left of the screen to return to the SharePoint front page.



On the front page you will see a *Search* line in the top right of the screen.



Simply enter term that you wish to search for and click on the magnifying glass to the right of the line to commence the search.

Not only is most of the information you enter into SharePoint searchable but much of the information inside documents stored in SharePoint is also searchable. This means that you can search information stored inside Word and Excel documents that are stored in SharePoint. With some additional configuration it is also possible to search Acrobat PDF documents.

Conclusion

SharePoint is a very powerful component that can easily be added to most Microsoft Windows Servers. It is the starting point from which you can create a solution to solve your collaboration needs. Basically, all you need to know is that SharePoint is a standard tool, much like Word or Excel that you can easily customize to suit your business needs.

This document has provided a very basic overview of some of the most common features available with SharePoint as well as taking you through a basic tutorial of these features. This document should make a great starting point for anyone wanting to come to grips with the basics of SharePoint on Windows Server 2008.

Where to go from here?

What has been shown here is only the tip of the iceberg as to what can be accomplished with SharePoint. The first place to start, if you want more information are the links and video section below. These will provide you with more information about SharePoint.

Further documents and information about utilizing the advanced features of SharePoint can be found at <http://www.ciaops.com> and <http://www.slideshare.net/directorcia>. If you are interested in receiving information about any upcoming documents about SharePoint please send an email to director@ciaops.com asking to be added to our regular newsletter.

If you have any feedback on the information provided here please contact director@ciaops.com.

Computer Information Agency
<http://www.ciaops.com>

Glossary

Alerts – Are settings that can be made to most components of SharePoint that will send an email to inform of changes in information. They can be customized in respect to what triggers the sending (change, delete, addition, etc) as well as the frequency (immediate, daily, weekly, etc). They are configured by each individual SharePoint user normally at the location they wish to monitor.

Document Library – Are storage locations in SharePoint specifically designed to manage any sort of document (Word, Excel, PDF, etc). Once here, documents can easily be sorted and displayed. It is also possible to configure check in/check out as well as document approval to give better document management than what is normally provided in folders on the local computer.

Picture Library – Are similar to Document Libraries but they are specifically designed for the management of images (JPG, BMP, TIFF, etc). They share many features with Document Libraries including the ability to check in/check out document as well as document approval. Importantly, Picture Libraries allow additional descriptive information to make locating images much simpler.

SharePoint – Is the Microsoft technology on which SharePoint is based. It is a web front end onto a database in its simplest form. It is accessed via a standard web browser but provides much greater functionality when viewed with Internet Explorer. SharePoint can be used to manage a variety of information sources from documents to ad hoc lists with everything inside it being fully indexed for search ability.

Views – Are different ways to display the same data. You are able to have a number of different Views of the same data between which you can easily select. Views can also be used to aggregate data within a list such as summing up values in a column, averaging values, or other aggregation functions.

Links

- Microsoft Windows SharePoint Services
<http://office.microsoft.com/en-gb/sharepointtechnology/default.aspx>
- Microsoft Office SharePoint Designer
<http://office.microsoft.com/en-us/sharepointdesigner/FX100487631033.aspx>
- 2007 Office System Document: Working Together in the New World of Work
<http://www.microsoft.com/downloads/details.aspx?FamilyId=F38AD00F-ED59-4411-BD9B-1E438DD5CC6B&displaylang=en>

Videos

- Demo: Tour a Windows SharePoint Services 3.0 site
<http://office.microsoft.com/en-us/sharepointtechnology/HA102055631033.aspx>
- A quick tour around a SharePoint site
http://www.cbtclips.com/sharepoint3/Assets/swf/wssv3_site_tour/wssv3_site_tour.html
- What is SharePoint?
<http://www.sharepoint-screencasts.com/Pages/5018.aspx?Screencast=5018>
- How to post announcements to the SharePoint home page
http://www.cbtclips.com/sharepoint3/Assets/swf/wssv3_announcement/wssv3_announcement.html
- Overview of the document management features built into SharePoint
http://www.cbtclips.com/sharepoint3/Assets/swf/wssv3_understanding_libraries/wssv3_understanding_libraries.html
- Microsoft Office System Webcast: Tips and Tricks to Get You Started Using Microsoft SharePoint Products and Technologies (Level 100)
<http://msevents.microsoft.com/CUI/WebCastEventDetails.aspx?culture=en-US&EventID=1032345262&CountryCode=US>
- Linking SharePoint 2007 with Outlook 2007
<http://www.youtube.com/watch?v=p9CnBNVnBjk>

About

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Robert has a degree in Electrical Engineering as well as Masters of Business Administration. He is also a Small Business Specialist and Microsoft Certified SharePoint Professional. Robert has over 15 years of IT experience in a variety of fields and positions, including working on Wall St in New York. He was the co-founder of Saturn Alliance an IT systems integration business in Sydney, Australia. He continues his involvement with information technology as the Principal of the Computer Information Agency. Apart from resolving client technical issues, Robert continues to present at seminars as well as write on a number of topics for the Computer Information Agency including being involved in the SMBITPro community in Sydney. Robert can be contacted via director@ciaops.com.

Company – Computer Information Agency (www.ciaops.com)

Founded in 1995, the Computer Information Agency is a specialized technology consultancy in Sydney, Australia that focuses on assisting businesses and individuals improve their productivity using technology and smart business practices. The Computer Information Agency has high levels of experience in technologies such as Windows Servers, including Small Business Server, and desktop applications such as Outlook, Word, Excel and Onenote.

With special emphasis placed on the business benefits of technology the Computer Information Agency is unique in its ability to work with companies to improve and streamline their processes utilizing the technology they already have in place. The focus is on providing an improved end result for the business which in the long run leads to greater productivity and profitability. More information about the Computer Information Agency can be found at <http://www.ciaops.com>.

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The Windows SharePoint Operations Guide (<http://www.wssops.com>) will help the IT Professional install, configure and maintain Windows SharePoint in a variety of environments. Since the product is subscription based you always get access to the latest SharePoint information in a clear and concise manner. For the price of a few hours of work you can have access to an ever growing library of SharePoint knowledge. It'll not only save you time and money but help you generate more revenue by teaching you about the fastest growing Microsoft technology. Sign up today and start reaping the benefits.