UF Health SharePoint 2010

Introduction to Content Administration
Introduction to SharePoint 2010
2.0 Hours

1.1 What is SharePoint 2010? .................................................................................................................. 2
1.2 How do I Get Access? ......................................................................................................................... 2
1.3 Signing In to SharePoint .................................................................................................................... 2
1.4 Your New Site ....................................................................................................................................... 2
1.5 Navigation ............................................................................................................................................. 3
1.6 Creating New Site Content and Quick Launch Menu Items ................................................................. 4

2.0 Lists ...................................................................................................................................................... 5
2.1 Calendar List - Add a Calendar Web Part, and Add an Event ............................................................... 5
2.2 Connect a Calendar to Outlook ........................................................................................................... 6
2.3 Custom List – Create a Customized Departmental or Project Team Contact List ............................... 6
2.4 Create a Searchable Person or Group List .......................................................................................... 7
2.5 Announcements List – Create and Edit an Announcement .................................................................. 8

3.0 Document Libraries .......................................................................................................................... 9
3.1 Editing Contents .................................................................................................................................. 9
3.2 Creating a New Folder Inside a Document Library ............................................................................ 9
3.3 Upload Single or Multiple Files into the Shared Documents Library .............................................. 10
3.4 Access – View and Edit Your Files ................................................................................................... 10
3.5 Check Out and Check In – Editing a Shared File, One User at a Time .............................................. 11
3.6 Alert – Alert Me When This File has Been Modified ....................................................................... 11
3.7 Category – Adding a Category Column to a Document Library ......................................................... 12
3.8 Explorer View – Open Your Document Library in an Explorer View .............................................. 12

4.0 Sites .................................................................................................................................................... 13
4.1 Create – Create a Team Site ............................................................................................................... 13
4.2 Settings – Turn on Publishing and Navigation (mandatory) ............................................................... 13
4.3 Updates – Editing or Modifying Your Team Site Page ..................................................................... 14

5.0 Permissions ........................................................................................................................................ 15
5.1 Uninherit Parent Permissions (only if permissions are different from the parent) ............................... 15
5.2 Grant Permissions to an Individual .................................................................................................... 15
5.3 Create a Group and Grant Permissions to the Group ....................................................................... 15
5.4 Add Members ..................................................................................................................................... 15

The Ribbon ............................................................................................................................................. 16

Contact Us .............................................................................................................................................. 17
1.0 INTRODUCTION TO SHAREPOINT 2010

1.1 What is SharePoint 2010?

Microsoft SharePoint 2010 is a collection of software that allows internal collaboration via a secure online platform or intranet site. Workspaces are typically used by a department or team to share documents and files, manage project timelines and tasks, post discussions and agendas, and schedule meetings.

1.2 How do I Get Access?

To get access to the UF & Shands Intranet or to a request a new site, submit a Service Request via the UF & Shands IT Help Desk portal: https://helpdesk.shands.ufl.edu. You’ll receive an email invitation to visit your new site when it’s ready.

1.3 Signing In to SharePoint

Users can sign in to SharePoint via an internet browser, preferably Internet Explorer (other browsers do not support full functionality). Paste or type the URL into the browser’s address bar.

If prompted by the Windows Security pop up message, enter your Username and Password and click OK. For example:

If you have a GatorLink account, type: UFAD\username and password for your GatorLink account.

If your email address is yourname@shands.ufl.edu, type: SHANDS\username and password from your work computer.

Note: Your computer may automatically log you into SharePoint, so this step will be bypassed.

1.4 Your New Site

Before adding elements, your new site will look something like this:
The sample site below shows a home page as it appears to a user with a Full Control permission level. Some of the basic features such as the **Site Actions Bar**, **Link Bar**, **Quick Launch Menu**, **Search Box**, and **Web Parts** are highlighted.

1.5 **Navigation**

There are several ways to navigate within a SharePoint site:

- The **Link Bar** displays links to the pages included in the current site. To navigate between pages, click on their tabs.

- The **Quick Launch Menu** allows you to navigate to the items on your current site, such as Libraries, Lists, Discussions, Surveys, and Pictures.

- There are quick access tabs at the top of the site in the **Site Actions Bar**. They include **Site Actions**, **Page Up**, **Browse**, **Page** and an **Edit** icon, which launches the standard Site Page editing tools. The **Page** tab will open the current page and allow edits to key elements.
1.6 Creating New Site Content and Quick Launch Menu Items

To add new Libraries, Lists, Discussion Boards, Surveys, or Pictures click on All Site Content at the bottom of the Quick Launch Menu. Click the Create icon to open the templates library.

The library of templates allows you to select the type of site content and menu item that you want to add. From here you can create a new Document, Image, or Page Library. You can also create a variety of lists.
2.0 Lists

2.1 Calendar List - Add a Calendar Web Part, and Add an Event

Add a Calendar Web Part:

In order to display this calendar on your home page, you need to add a Web Part. On the Site Actions Bar, click the Navigate Up icon to return to your home page.

- On the Site Actions Bar, click on the Page Tab to open the Page Ribbon
- Click the Edit icon
- Click on the area of your page where you want to insert your web part
- Click the Insert tab to display its options
- Click the Web Part icon
- Select the Calendar option (Choose the Events calendar)
- Click Add

On the Site Actions bar, click the “Save and Exit” icon to save your changes. Then, click the Browse Tab to view your page with the calendar inserted.

Add an Event to Your Calendar:

- Under the newly inserted web part Event calendar, click the Add new event link (you may need to scroll to the left in your browser window).
- Fill in the form with the information about your new event

Edit your Calendar View
To return to your homepage, close the Outlook Calendar window, then click the Browse tab.

2.2 Connect a Calendar to Outlook
- Click the calendar web part to launch the Calendar Tools.
- Click the Calendar tab under Calendar Tools
- Select Connect to Outlook
- At both prompts, click Allow

The new Contact List has been added to the Quick Launch Menu.

Now that you’ve created a Contact List, you can add your desired columns.
- On the List Tools tab, click List to open the List Ribbon
- Select Datasheet View
- Right-click on the header area of the datasheet and select Add Column
- Specify settings for your column
  1. Enter a column name (in this case, Salutation)
  2. Select the Choice radio button
  3. Type each choice on a separate line (e.g., Mr. Mrs. Ms.)
  4. Click OK
Continue with the steps above to add columns (e.g., Last Name, First Name, Phone) with customized settings.

2.4 Create a Searchable Person or Group List

- In the Quick Launch Menu, click Lists
- Click the Create icon
- Select the Custom List template
- Enter a Name for your new Group List
- Click Create

The new Custom List has been added to the Quick Launch Menu.

Now that you’ve created a Custom List, you can add your desired columns.

- On the List Tools tab, click List to open the List Ribbon
- Select Datasheet View
- Right-click on the header area of the datasheet and select Add Column
- Specify settings for your column
  1. Enter a column name (in this case, Group List)
  2. Select the Person or Group radio button
  3. Click OK

You can now add people in the Datasheet view; click the Items tab and then New Item; or switch to the standard view and click the Add new item link and complete the form.
2.5 Announcements List – Create and Edit an Announcement

Create an Announcement:

- In the **Quick Launch Menu**, click **Lists**
- Click the **Announcements** icon
- In the List Tools window, click **Add new announcement**
- Enter **Title**, **Body**, and **Expires** text in the dialog box
- Click **Save**

Edit an Announcement:

- In the **Quick Launch Menu**, click **Lists**
- Click the **Announcements** icon
- Hover your mouse over the announcement to be edited
- Click on the checkbox that appears to the left of the desired announcement to open the **Lists Ribbon**

- Click the **Edit Item** icon
- Enter **Title**, **Body**, and **Expires** text in the dialog box
- Click **Save**
3.0 Document Libraries

3.1 Editing Contents

Site Actions displays options for editing pages; creating new pages, libraries, lists, and subsites; viewing all site content; changing site permissions; and accessing site features. Click on Site Settings to see a listing of all of the site’s features and then select the item that you want to edit.

To View All Site Content, select that option from the Quick Launch Menu from the Site Actions drop down list. You’ll see the site’s contents grouped into categories (e.g., Document Libraries, Lists, Sites, etc). Click the icons to add content.

3.2 Creating a New Folder Inside a Document Library

1. In the Quick Launch Menu, select Shared Documents
2. Click the Documents tab in Library Tools and select New Folder
3. Name the folder and click Save
3.3 Upload Single or Multiple Files into the Shared Documents Library

- In the Quick Launch Menu, click Shared Documents
- On the List Tools tab, click Documents to launch the Documents Ribbon
- To upload a single document, click the Upload Document icon to open the Upload Document dialog box
- Browse... to the desired document
- Choose File to Upload
- Click Open
- Click OK

Or

- Select Upload Multiple Documents...
- Open your Windows Explorer
- “Drive” to the folder location on your computer
- Drag and drop the desired documents into the upload multiple documents form
- Click OK
- Click Done

3.4 Access – View and Edit Your Files

Since the file uploads (above) were performed from within the Shared Documents area, you will find your newly uploaded files by clicking on the Shared Documents option within the Quick Launch Menu. Note that the uploaded, shareable files now reside on the SharePoint server.

View:

- In the Quick Launch Menu, click Shared Documents
- Click on the name of the document to be viewed
- To close the document, click the X in the upper right of the window

Edit:

- In the Quick Launch Menu, click Shared Documents
- Hover over the name of the document to be edited
- Click the checkbox that appears beside the document icon
- Click the Edit Document icon
- Make the desired changes and save and close your document

Remember, you’re editing a file which resides on the SharePoint server.
3.5 Check Out and Check In – Editing a Shared File, One User at a Time

With document library files, you should always check out a file before opening it and making changes. This prevents other users from opening the file and making changes while you have it checked out. If a user views the file while you have it checked out, he or she will see the last file that was checked in, not the one that you're working on. Once you check the file back in, users can see the updated document.

**Check Out:**
- In the Quick Launch Menu, click Shared Documents
- Hover over the name of the document to be checked out
- Click the checkbox that appears beside the document icon
- Click the Check Out icon
- Click OK

**Check In:**
- In the Quick Launch Menu, click Shared Documents
- Hover over the name of the document to be checked in
- Click the checkbox that appears beside the document icon
- Click the Check In icon
- Click OK

3.6 Alert – Alert Me When This File has Been Modified

You can set your specific alert criteria within the New Alert screen, such as alert title, who you want the alert sent to, delivery method, which changes should evoke the alert, and when to send the alerts.

- In the Quick Launch Menu, click Shared Documents
- Hover over the name of the document that you want to set alerts for
- Click the checkbox that appears beside the document icon
- Click on the Alert Me icon
- Select Set alert on this document
- Specify settings for your alert in the dialog box
  1. Enter a title for your alert
  2. Enter the send alert to email address
  3. Select your delivery method
  4. Select when changes should send you an alert
  5. Click OK
3.7 Category – Adding a Category Column to a Document Library

When you add a column to a document library, you add a new type of property that users can set for files in that library. You can require that users enter data for a column, or data can be optional. By adding columns (properties), you make it easier to sort, filter, and organize files for retrieval.

- In the Quick Launch Menu, click the Shared Documents option
- On the List Tools tab, click Library to open the Documents ribbon
- Click the Create Column icon to open the Create Column dialog box
- Specify your custom view settings

1. Enter a name for your view such as Document Category
2. Select the type of column such as Choice
3. Enter the choices you want to be displayed in the drop down menu
4. Click OK

Now that you’ve created your custom Document Category, you can add files to the library and will have the opportunity to input the type of Document Categories that are appropriate for your document(s).

- In the Quick Launch Menu, click Shared Documents
- On the List Tools tab, click Documents to open the Documents ribbon
- Click the Upload Document icon
- Select Upload Document
- Browse to the desired document
- Specify your document settings
  1. Enter a name for your document
  2. Enter a title for your document
  3. Select the type of Document Category appropriate for your document, if desired
  4. Click Save

3.8 Explorer View – Open Your Document Library in an Explorer View

You can open any document library within a SharePoint site in Explorer view by selecting the Open with Explorer option on the Library Ribbon.

- In the Quick Launch Menu, click the Shared Documents option
- On the List Tools tab, click Library to open the Library Ribbon
- Click the Open with Explorer icon
- Drag and drop files into the folder, double-click to open a file or select multiple files for moving, copying or deleting
- Click the close button on the upper right of the window to exit Explorer view

Please remember that you are not working in Windows Explorer on your local drive. You are viewing your SharePoint content in an Explorer View. Your content resides on the SharePoint Server.
4.0 Sites

4.1 Create – Create a Team Site

- On the Site Actions Bar, click Site Actions
- Select New Site
- Click the Team Site template icon
- Specify your site settings
  1. Enter a title for your site
  2. Enter the URL name that will be added to the end of the parent’s URL
  3. Click Create

4.2 Settings – Turn on Publishing and Navigation (mandatory)

**Publishing:**

- On the Site Actions Bar, click Site Actions
- Select Site Settings
- Select Manage site features from the Site Actions group
- Scroll down to the SharePoint Server Publishing option and click the Activate button on the far right

**Navigation:**

- On the Site Actions Bar, click Site Actions
- Select Site Settings
- Select Navigation from the Look and Feel group
- Specify your navigation settings
**Global Navigation (mandatory)**

1. Select the **Display the same navigation items as the parent site** radio button
2. Click the **Show subsites** checkbox

**Current Navigation**

1. Select either the **second or third options** radio button
2. Click the **Show subsites** checkbox
3. Click **OK**

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On the **Site Actions Bar**, click the **Navigate Up** icon to locate and return to your home page.

**4.3 Updates – Editing or Modifying Your Team Site Page**

- On the **Site Actions Bar**, click **Page** to open the **Page Ribbon**
- Click the **Edit** icon to launch the **Editing Tools Ribbon**
- Highlight and replace the ‘Welcome to your site!’ header with your department name
- Highlight and replace the intro text with information about your department
- Delete the current image and insert an image of your department chair or other approved graphic

1. Click the image and press **Delete** on your keyboard
2. On the **Editing Tools Ribbon**, click **Insert**
3. Click **Picture** to open the dropdown box
4. Select **From Computer**
5. **Browse**... to the desired image
6. Select it and click **Open**
7. In the Select Picture dialog box, use the dropdown box to **Upload to: Images**
8. Click **OK**
9. In the Images dialog box, enter a title for your image, if desired
10. Click **Save**
11. Click the **Save & Close** icon on the **Site Actions Bar**
5.0 Permissions

5.1 Uninherit Parent Permissions (only if permissions are different from the parent)

- On the Site Actions Bar click Site Actions
- Select Site Permissions
- Click the Stop Inheriting Permissions icon
  (Note: You must leave Academic Health Center Owners, Style Resource Readers, and System Account intact)
- Read the Message from webpage and click on the OK
- To remove permissions for a person or a group, click the check box and then click the Remove User Permissions button

5.2 Grant Permissions to an Individual

- On the Site Actions Bar, click Site Actions
- Select Site Permissions
- Click the Grant Permissions icon
- In the Select Users input box, enter the e-mail address of the desired member
- In the Grant Permissions input box, select the Grant users permission directly radio button
- Check the appropriate permission(s)
- In the Send E-Mail input box, write a Personal Message, if desired
- Click OK

5.3 Create a Group and Grant Permissions to the Group

Create Group:

- On the Site Actions Bar, click Site Actions
- Select Site Permissions
- Click the Create Group icon
- Specify your group settings
  1. Enter a name for your group (use your Department prefix to identify the group being created)
  2. Enter a description for your group (enter the SharePoint site name that the group is affiliated with)
  3. Enter the group’s owner(s)
  4. Select the appropriate Group Settings
  5. Select the desired Membership Requests settings
  6. Select the appropriate Permission(s) for this group
  7. Click Create

5.4 Add Members

- On the Site Actions Bar, click Site Actions
- Select Site Permissions
- Click the Grant Permissions icon
- In the Select Users input box, enter the e-mail address of the desired group members
- In the Grant Permissions input box, select your newly created group
- In the Send E-Mail input box, write a Personal Message, if desired
- Click OK
The Ribbon

SharePoint 2010 uses a **Ribbon** feature, which groups editing tools into contextual tabs depending on the item that you have selected to edit or insert.
Contact Us

- UF Health IT Training:
  http://training.health.ufl.edu/public_contactus.aspx

- Training Registration, Schedules and Handouts Website:
  http://training.health.ufl.edu

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