

# Microsoft SharePoint 2010

## 1 – Getting to know SharePoint 2010



# GETTING TO KNOW SHAREPOINT 2010



Microsoft SharePoint 2010 is a business collaboration platform that allows people to build websites. But unlike typical Internet websites, these sites make use of special features such as lists and libraries that make it easier for people to work collaboratively.

## In this booklet we will show you how to:

- ✓ manage **SharePoint**
- ✓ master user accounts
- ✓ start **SharePoint**
- ✓ identify the core elements of a **SharePoint** site
- ✓ navigate a **SharePoint** site
- ✓ evaluate **SharePoint team** sites
- ✓ recognise libraries in **SharePoint**

# WHAT IS SHAREPOINT?

Unlike applications such as Word or Excel, Microsoft SharePoint is not an application that you install on your computer. It is a network-based product that is installed on your company's servers. In very simple

terms, SharePoint is a tool that allows people to create websites to store, access and share content for a variety of business needs.

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## What Is SharePoint Used For?

SharePoint has an enormous number of features and components that can be turned on and off by the administrator as desired. As a result of this, SharePoint is extremely flexible allowing it to be used for many different business purposes. Examples of some common usages include:

- SharePoint is commonly used to improve collaboration among teams of people in organisations, such as in the Finance Division or HR. To do this, you create SharePoint **team sites**. A team site is a website in which members can upload and share documents, assign tasks, view team events and meetings on a shared calendar, and more.
- SharePoint provides an organisation with a place to store all of its content. Rather than saving documents on multiple shared network drives, or on personal drives and then people having to email them back and forth, it's easier to place it all in one centrally managed repository. Using the security options in SharePoint, sensitive content can be placed in areas where it can be monitored and accessed by a limited number of people, while other content can be placed in areas where everyone has total access to it.
- In many larger organisations, SharePoint is often used as a corporate portal or intranet. A corporate portal connects the individual SharePoint sites within the organisation and allows access to information and business applications. For example, staff can download forms, read the latest company news, perform company-wide searches for documents, and more.

## What Do SharePoint Sites Look Like?

It is almost safe to say that no two SharePoint sites will look or be the same – and this is because of choices made during the building of a SharePoint site and because the sites are accessed using different web browsers, such as Internet Explorer, Firefox, Chrome and so on.

- **Permissions** – If you have been assigned the **Full Control** permission level, you have access to the full range of options to manage the site. If you have been assigned the **Contribute** permission level, you will have access to fewer options. If you have been assigned the **Read** permission level, you can only read content but not change it. Note that permissions are flexible and your organisation may create its own permission settings.
- **Customisation** – Your organisation may choose to customise SharePoint. For example, it may apply branding to a site, customise site navigation, remove the ribbon functionality, and more. SharePoint is highly flexible.
- **SharePoint Version** – SharePoint is available in two versions. **SharePoint Foundation** is the underlying technology for all SharePoint sites and it is installed on Windows-based servers.

Although Foundation provides a great deal of functionality, most larger organisations will install **SharePoint Server** (and there are two editions of this product – **Standard** and **Enterprise** – each adding more features) to gain additional features and capabilities from those provided by the underlying Foundation. West Sussex County Council has installed the **Enterprise** edition.

So as you are working your way through this course, be aware that your SharePoint site may look totally different to our samples and that you may or may not have access to the features to which we refer.

# USER ACCOUNTS

The following chapters have been designed (and separated accordingly) with three user groups in mind: readers, contributors and developers. These user groups have access to different SharePoint features,

based on their user permissions. Here we describe the permissions for the three user accounts and explain how to use your SharePoint site using these different

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## User Account Basics

You will be granted various user accounts access to the SharePoint site, where each account belongs to one of the three permission groups shown below.

- Accounts with **Read** permissions. All users will be able to read only the content of other team sites and not make any changes.
- Accounts with **Contribute** permissions. Users will be members of their team sites and can add documents, tasks, and so on.
- Accounts with **Full Control** permissions. Users will be the team site owners and can build sub-sites, determine who can use the site, and much more.

# STARTING SHAREPOINT

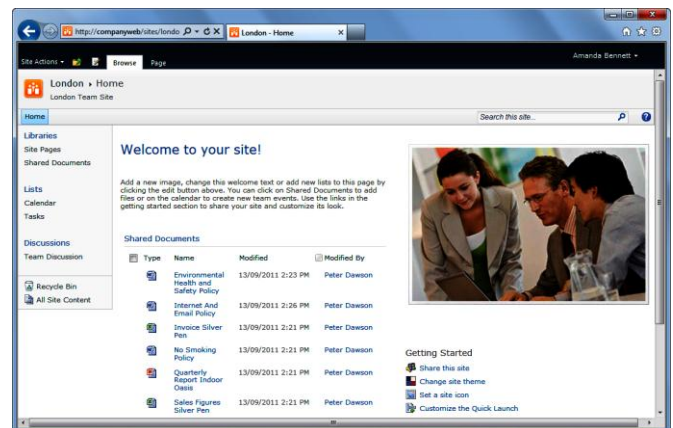
To access a SharePoint site, you must use an internet browser application. This is because SharePoint is a web-based application that uses specialised websites to gather, organise and present the

information that you can access. You must know the location of the site – if you don't, ask your administrator for the link to the specific site.

## Example:

- 1 Open an internet browser  
*This example used Internet Explorer but you can use other browsers, such as Firefox. Before you can open a SharePoint site, you will need to get the link to the team site*
- 2 Type the link to the site in the **URL** box near the top of the browser window and press   
*Depending on the setup of the site, you might be prompted for a password...*
- 3 If the **Windows Security** dialog box appears, type the **User name** and **Password**, and then click on **[OK]**  
*Your SharePoint team site will display. Your site may look different to our example as it depends on the way the site manager has set up the site*

*If you don't have access to a particular SharePoint site, SharePoint will display an Access Denied page informing you of this. If this occurs, you will need to contact the site manager and request that they grant you permission to access the site.*



- 3 The URL to the site in our sample here is <http://companyweb/sites/london>

## For Your Reference...

To **access** a **SharePoint website**:

1. Open an internet browser
2. Type the link to the site in the **URL** box
3. Press
4. Type the **User name** and **Password** and click on **[OK]** if prompted

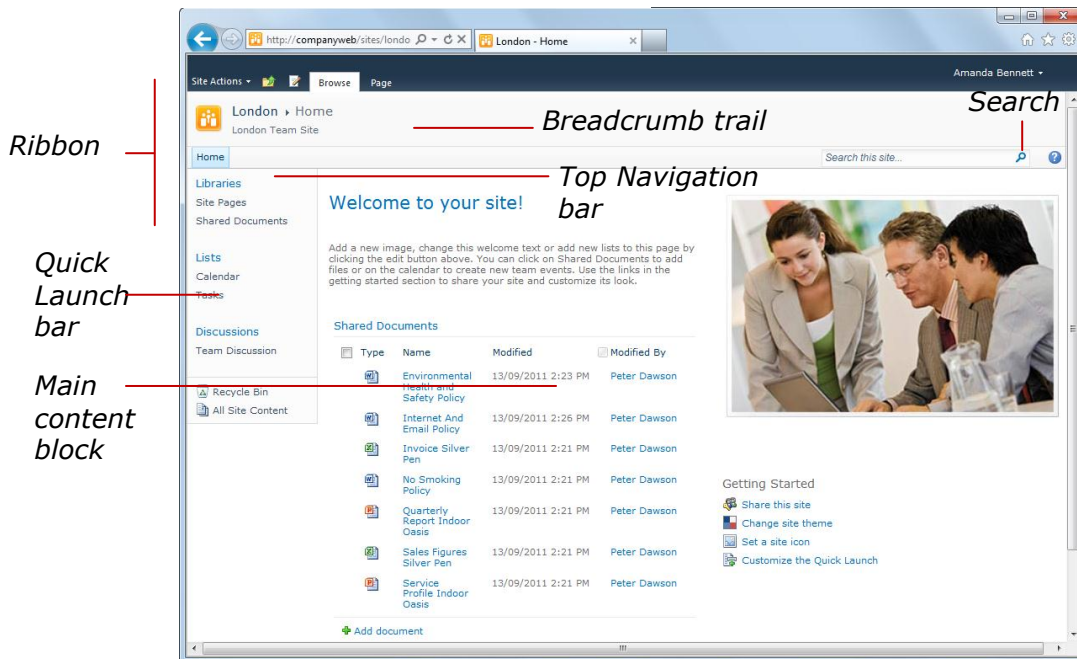
## Handy to Know...

- If you are in a SharePoint site using someone else's PC and login, you can log in as yourself. To do this, click on the name to the right of the ribbon to display a menu, select **Sign in as Different User** and sign in as described above. When you're finished, select **Sign Out** from the same menu.

# CORE ELEMENTS OF A SHAREPOINT SITE

All SharePoint sites are created from a template that best suits a particular business purpose. But regardless of which template is used, all sites tend to comprise the same basic elements. Here we look at

one of the most commonly-used websites in SharePoint – the team site – to describe the core elements. Once you know how to use a team site, you can use any SharePoint site.




## Ribbon

The ribbon organises SharePoint's options into two types of tabs. Common actions for the tasks you do are grouped together and placed on tabs that appear as you move through your site (such as the **Browse** tab above). **Contextual tabs** appear when you perform specific actions, offering only commands that are relevant to what you're doing (such as the **Page** tab above).

When the **Browse** tab is selected in the ribbon (as above), a **breadcrumb trail** showing where you are in the website appears below the tabs. For instance, the **Home** page of the **Alpheius London** website is currently displayed in the above example. You can also use this breadcrumb trail for navigating the site as all components of it, except for the last one, are clickable. E.g., if you had clicked on a link in the Quick Launch bar, you could click on **Alpheius London** in the breadcrumb trail to quickly redisplay the **Home** page. Alternatively, you could also click on **[Home]** in the **Top Navigation bar**. (Note, if this site had any sub-sites, links to these sub-sites would appear to the right of **[Home]** in the Top Navigation bar.

The **Site Actions** menu appears to the left of the ribbon. This menu may appear and the options that it offers (such as **Edit Sites** or **View All Site Content**) will depend on the permission level that you've been granted (e.g., **owners** can create and edit sites while **readers** can only view content) and the version of SharePoint that you're using.

The **Navigate Up** tool  shows where the current page fits into the overall hierarchy of the site. You can also click on the options shown in its drop-down menu to navigate your site.

## Quick Launch bar

The quick launch bar provides clickable links to various SharePoint elements, including libraries (e.g., **Shared Documents**), lists (e.g., **Calendar**), **Recycle Bin** and **All Site Content** (which shows all content in the site including lists and libraries that aren't displayed in the Quick Launch bar).

## Search


You can type words into **Search this site**, press  and SharePoint will display the results in the **Search Results** page.

## Main content block

It is intended that you edit the content on the page, including the text, stock image, formatting and so on. SharePoint even provides hints with the **Getting Started** information.

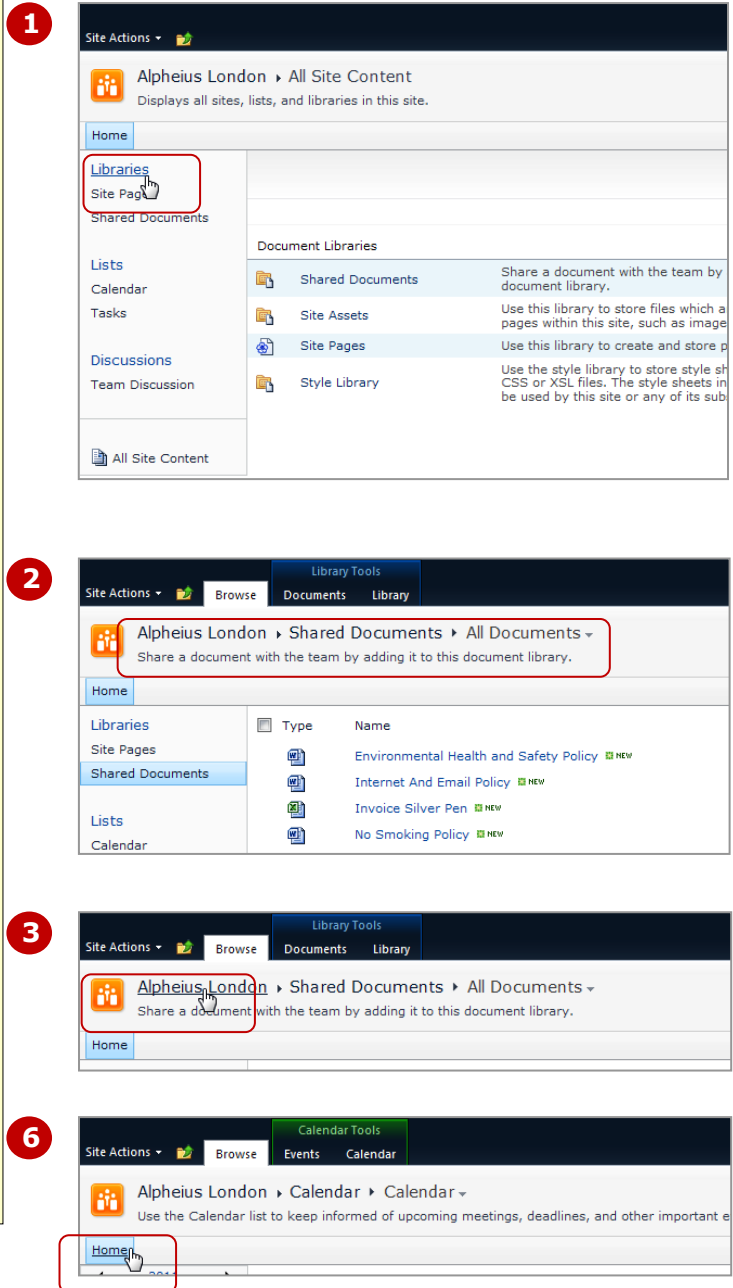
# NAVIGATING A SHAREPOINT SITE

SharePoint provides four features for navigating a site, but whether you have access to all of these will depend on your site. The **Browse** tab of the ribbon includes three navigational aids: the

**breadcrumb trail**, **top navigation bar** and the **Navigate Up** tool . Often, the **quick launch bar** also appears to the left of the page.

## Example:

- 1 We clicked on **Libraries** in the Quick Launch bar to see a list of all libraries in the team site  
*Document libraries are where you store files in SharePoint...*
- 2 Then we clicked on **Shared Documents** under **Document Libraries** in the content block to open this library  
*Our breadcrumb trail shows that we're looking at the All Documents view of the Shared Documents library in the Alpheius London site. The breadcrumb can also be used for navigation...*
- 3 Then we clicked on the first link in the breadcrumb trail (**Alpheius London** in our case) to display the Home page again
- 4 Next we clicked on **All Site Content** in the Quick Launch bar to see links to everything in the site  
*This is a very useful link as not everything may be listed in the Quick Launch bar...*
- 5 Then we clicked on **Calendar** under **Lists** in the content block to open the **Calendar**
- 6 Finally we clicked on **[Home]** in the Top Navigation bar to display the Home page again



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## For Your Reference...

To **navigate** a **site**:

- Click on a link in the Quick Launch bar, such as a library or **All Site Content**
- Click on the **Browse** tab in the ribbon and click on **Navigate Up** , a link in the breadcrumb trail, or on a link in the Top Navigation bar to navigate to a sub-site

## Handy to Know...

- You can click on **Navigate Up**  in the ribbon to see where the current page fits in the site, and then click on a page in the drop-down menu to display it. This is particularly useful for sites with lots of sub-sites.
- You can use the browser's tools, **Forward** and **Back**, to move between visited pages.

# SHAREPOINT TEAM SITES

A SharePoint **site** is a specialised website used to gather, organise and present the information you put into SharePoint. Sites can serve a general purpose – e.g., a team site may store documents, schedules and

other information that team members refer to frequently. Other sites may be quite specific in their purpose – e.g., keeping track of a meeting or hosting a blog.

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## Sites

SharePoint sites are different in structure to typical internet websites. Internet websites comprise linked pages, while SharePoint sites comprise pages that act as repositories for information and content. SharePoint sites store this information and content in special containers known as **document libraries** (you'll learn about these SharePoint elements later in this chapter).

SharePoint lets you create many types of sites (as long as you have the correct permission) based on its various templates. An example of one of the common sites used for collaboration include:

- **Team Site** – only the members of the team can log onto this private website and use it to communicate, upload documents, keep track of to-dos, milestones, meetings, discussions and more

The structure of the SharePoint sites created for users in an organisation will vary enormously. With that said, however, most larger companies will create team sites for their various departments and teams.



# LIBRARIES

A **library** is a special type of a list where every list item is a file. Other information – such as the file type and file name – is also stored in the library. There are several

different types of libraries available in SharePoint with their main differences being in the types of files that they store.

## Document Libraries

Most people working with SharePoint will work with document libraries, such as the **Shared Documents** library in a team site (as shown below). You will find a document library in nearly every SharePoint site, and in many cases, more than one document library.

Document libraries allow you to store, work on and share documents, such as Word documents, Excel workbooks, PowerPoint presentations, Adobe PDF files, and more. To add files to a document library, you must either upload them or create new files from within SharePoint using the **New Document** tool in the library.

The screenshot shows the SharePoint 2010 interface for a document library. The top navigation bar includes 'Site Actions', 'Browse', 'Documents', and 'Library'. The user 'Amanda Bennett' is logged in. The breadcrumb path is 'Alpheius London > Shared Documents > All Documents'. Below the breadcrumb is a search bar and a 'Home' button. A left-hand navigation pane lists various site features like 'Libraries', 'Site Pages', 'Shared Documents', 'Lists', 'Calendar', 'Tasks', 'Discussions', and 'Team Discussion'. The main content area displays a table of documents with columns for 'Type', 'Name', 'Modified', and 'Modified By'. All documents in the list are marked as 'NEW'.

Type	Name	Modified	Modified By
Word Document	Environmental Health and Safety Policy <span>NEW</span>	13/09/2011 2:23 PM	Peter Dawson
Word Document	Internet And Email Policy <span>NEW</span>	13/09/2011 2:26 PM	Peter Dawson
Word Document	Invoice Silver Pen <span>NEW</span>	13/09/2011 2:21 PM	Peter Dawson
Word Document	No Smoking Policy <span>NEW</span>	13/09/2011 2:21 PM	Peter Dawson
Word Document	Quarterly Report Indoor Oasis <span>NEW</span>	13/09/2011 2:21 PM	Peter Dawson
Word Document	Sales Figures Silver Pen <span>NEW</span>	13/09/2011 2:21 PM	Peter Dawson
Word Document	Service Profile Indoor Oasis <span>NEW</span>	13/09/2011 2:21 PM	Peter Dawson

## Accessing Libraries

Just like lists, you can access libraries by clicking on their links in the Quick Launch bar or in the **All Site Content** page if their links aren't included in the Quick Launch bar. You can also access the contents of a library on a page in your site by inserting a web part that points to the library – for example, the **Shared Documents** library is included in a web part on the home page in a default team site.

# VIEWS

Whenever you look at a list or library in SharePoint, you are looking at a **view** of that list. The list's underlying data is stored in database tables on the SharePoint server. So, rather than seeing all data

stored in a list, different views present the information by displaying specific columns and by applying various sorting, filtering, grouping and styling criteria.

## Types Of Views

There are several types of views used in SharePoint. The default view for the majority of lists is **Standard view** which is a tabular format with column headers and the values displaying in rows. Standard view is ideal if you wish to sort the information by a specific column header or filter the information so that only specific records will display (as shown in the example below).

The screenshot shows a SharePoint interface with a list of tasks. The 'Assigned To' column is highlighted with a red box, and an upward-pointing arrow is visible to its right, indicating ascending sort order. The table contains four rows of task entries.

Type	Title	Assigned To	Status	Priority	Due Date	% Complete	Predecessors
	Write Leave Policy first draft	Amanda Bennett	In Progress	(2) Normal	25/10/2011	20 %	
	Write Leave Policy final draft	Amanda Bennett	Not Started	(2) Normal			Review Leave Policy
	Review Leave Policy	Peter Dawson	Not Started	(2) Normal			Write Leave Policy first draft
	Review Leave Policy final draft	Peter Dawson	Not Started	(2) Normal			Write Leave Policy final draft

The Task list above has been sorted on the column Assigned To. An up arrow appears to the right of the column header showing that it has been sorted in ascending order

There are other types of views available in SharePoint.

**Datasheet view** is a special type of view that displays the underlying data in a spreadsheet format. This view is ideal if you wish to quickly add several records to a list as you can directly edit the data in the columns in this view.

**Calendar view** is a special view that formats the underlying data into a calendar. This view filters the data so that you see only the required data, such as a month's worth of calendar information, and this calendar information shows only a summary of the scheduled events (rather than all of their details). Calendar view is the default view when you access a **Calendar list**.

SharePoint provides one or more views for each list and if necessary, you can also create custom views. To change views, either click on the final option in the breadcrumb trail (**Change Views**) and select an option, or select a different view in the **Manage Views** group on the **List** tab.

# CONCLUDING REMARKS

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## **Congratulations!**

You have now completed the **Getting to know SharePoint 2010** booklet. This booklet was designed to get you to the point where you can competently perform a variety of operations as listed in the objectives on page 2.

We have tried to build up your skills and knowledge by showing you specific tasks. The step by step approach will serve as a reference for you when you need to repeat a task.

## **Where To From Here...**

The following is a little advice about what to do next:

- Spend some time playing with what you have learnt. You should reinforce the skills that you have acquired and use some of the application's commands. This will test just how much of the concepts and features have stuck! Don't try a big task just yet if you can avoid it - small is a good way to start.
- Some aspects of the course may now be a little vague. Go over some of the points that you may be unclear about. Use the examples and exercises in these notes and have another go - these step-by-step notes were designed to help you in the classroom and in the work place!

Here are a few techniques and strategies that we've found handy for learning more about technology:

- visit CLD's e-learning zone on the Intranet
- read computer magazines - there are often useful articles about specific techniques
- if you have the skills and facilities, browse the Internet, specifically the technical pages of the application that you have just learnt
- take an interest in what your work colleagues have done and how they did it - we don't suggest that you plagiarise but you can certainly learn from the techniques of others
- if your software came with a manual (which is rare nowadays) spend a bit of time each day reading a few pages. Then try the techniques out straight away - over a period of time you'll learn a lot this way
- and of course, there are also more courses and booklets for you to work through
- finally, don't forget to contact CLD's IT Training Helpdesk on **01243-752100**