

Microsoft SharePoint 2010

2 – Documents and lists



DOCUMENTS AND LISTS

InFocus

SharePoint is most commonly used to store information. Files such as Word documents or Excel workbooks are stored in **libraries** while other information is stored as list items in **lists**.

As a **reader** in SharePoint, you can view and find information but you can't change it. With that said, however, there's still plenty that you can do when it comes to looking at documents in libraries and data in lists. You can read and download files, set up alerts that let you know when new items have arrived or existing ones have been modified, and more.

In this booklet you will be shown how to:

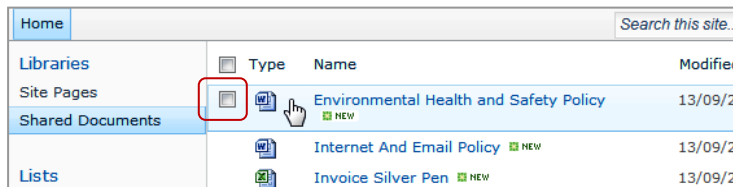
- ✓ Understand how to select documents and list items
- ✓ read documents
- ✓ email a link to a document
- ✓ learn how to display the version history of a document
- ✓ view document properties and list item details
- ✓ create an alert on a document or list item
- ✓ create an alert on a document library or list
- ✓ manage your alerts on a site

SELECTING ITEMS

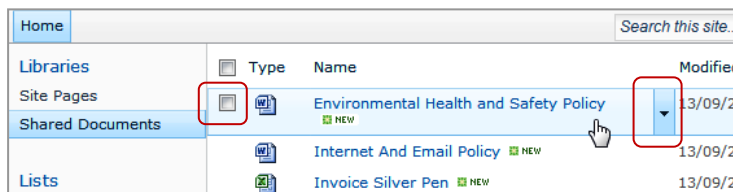
As a new SharePoint user, one of the more confusing things that you need to understand involves selecting items such as selecting a document in a library or an item in a list. It's not just a case of clicking

on the item to select it. Depending on where you hover over an item, a check box, link or menu drop arrow (or two or three of them) may appear.

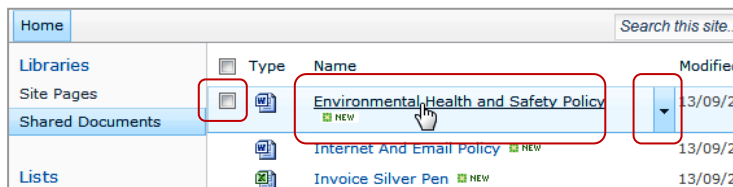
What Happens When You Hover Over A List Item?



If you hover in the area just to the left of the Name/Title of the desired document/item, a **check box** will appear (as shown to the left).



If you hover just below the Name/Title or in the area to the right of the Name/Title of the document/item, a **check box** and the **menu drop arrow** will both appear (as shown to the left).

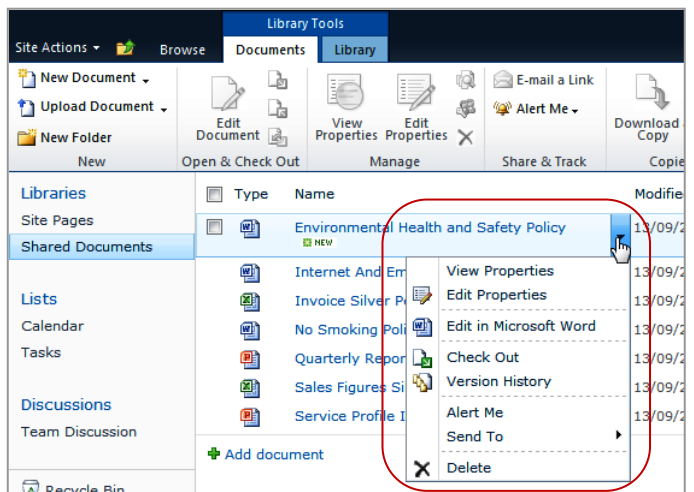
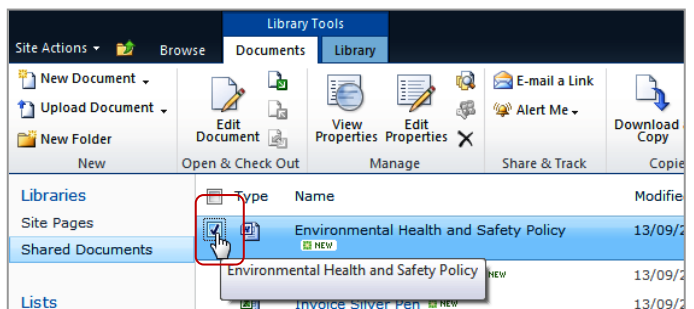
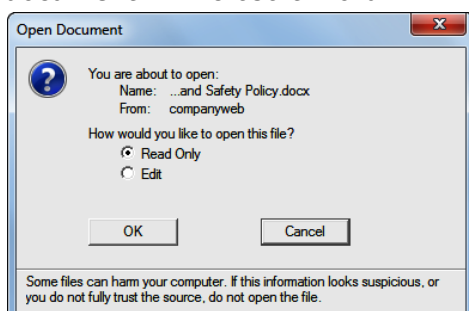


If you point to the actual Name/Title of the document/item, a **check box** and the **menu drop arrow** will both appear plus a clickable **link** (to the actual file/list item) will be added to the Name/Title (as shown to the left).

How Do You Use These Tools?

Click on the **check box** to select a specific document/item and to open the **Documents** or **Items** tab on the ribbon (as shown to the right). You can then apply a specific command to that item such as edit its properties, download a copy, attach a file to a list item, etc. Click on the **drop arrow** to display a menu of the most common commands that you can apply to a single document/item (as shown to the right) – this method is a quicker alternative to the above method.

Point to the Name/Title and then click on the **link** when you want to open the actual document or item. For example, clicking on the link for **Environmental Health and Safety Policy** will display the following message box and then open the document in Microsoft Word.



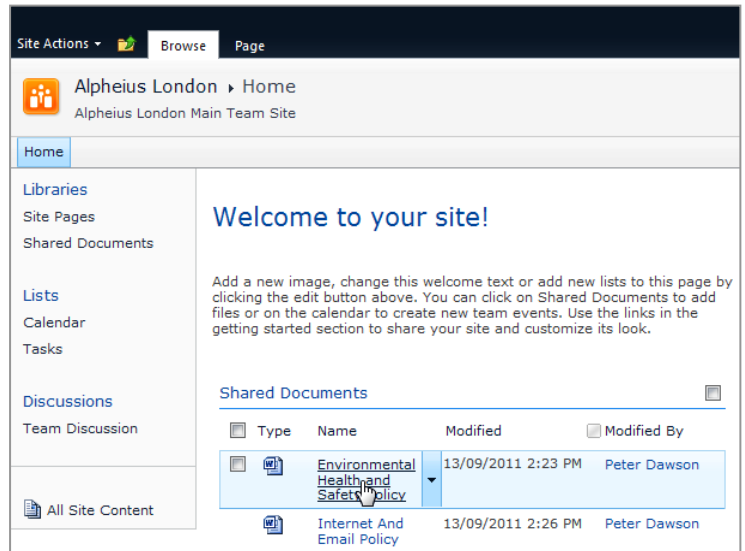
READING A DOCUMENT

Documents are stored in document libraries in SharePoint. To read a document, you must first navigate to the library and then click on the document's name to open it. In our case, the home

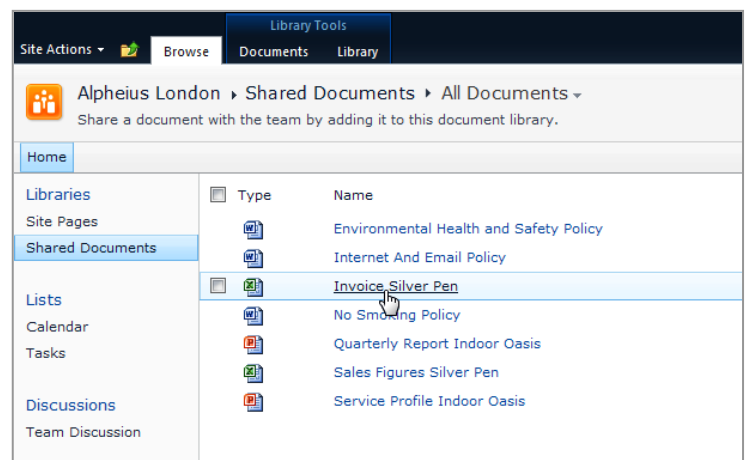
page includes a web part pointing to the **Shared Documents** library (which is where our documents are stored) which means that you can open files either from the home page or the library.

Example:

- 1 We hovered over the Name of the top file under **Shared Documents** on the Home page
The Name will become a link to the actual file...
- 2 Then clicked on the **Environmental Health and Safety Policy** link, then clicked on **[OK]** to open the file in Microsoft Word (which was the application used to create this file)
- 3 We closed Word to return to the SharePoint site
You can also read files from within the library itself...
- 4 Next we clicked on **Shared Documents** in the Quick Launch bar to open this library, then hovered over the Name of the file called **Invoice Silver Pen**
And ensured that its Name changed to a clickable link...
- 5 Next we clicked on the **Invoice Silver Pen** link, then clicked on **[OK]** to open the file in Microsoft Excel
- 6 Finally we closed Excel to return to SharePoint, then navigated to the Home page



1



4

For Your Reference...

To **read** a **document**:

1. Open the document library where the file is stored, such as **Shared Documents**
2. Hover over the **Name** of the document until a link appears, then click on the link

Handy to Know...

- Depending on the configuration of your computer, the document may open in a new browser window or in the associated application (for example, presentations will open in PowerPoint). You might also be prompted to choose whether to open the file in read-only or edit mode.

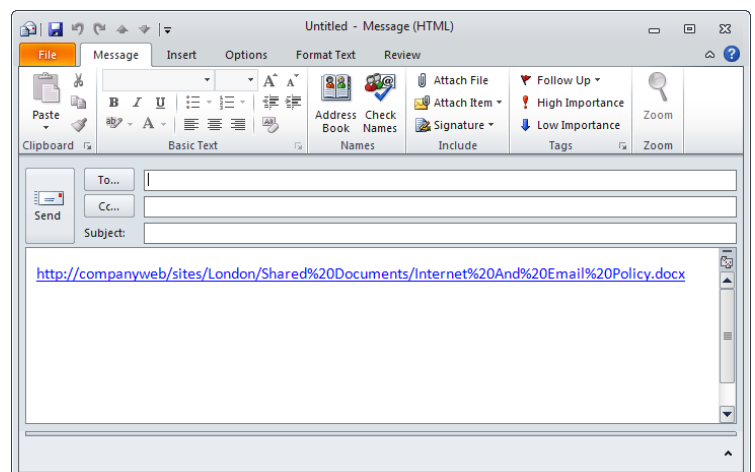
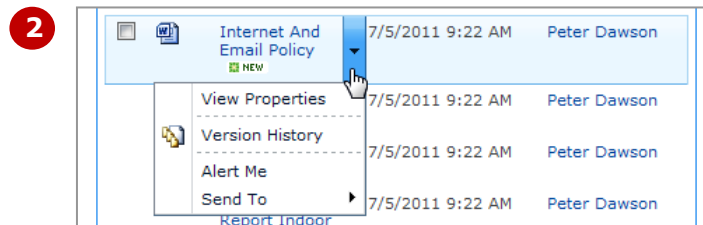
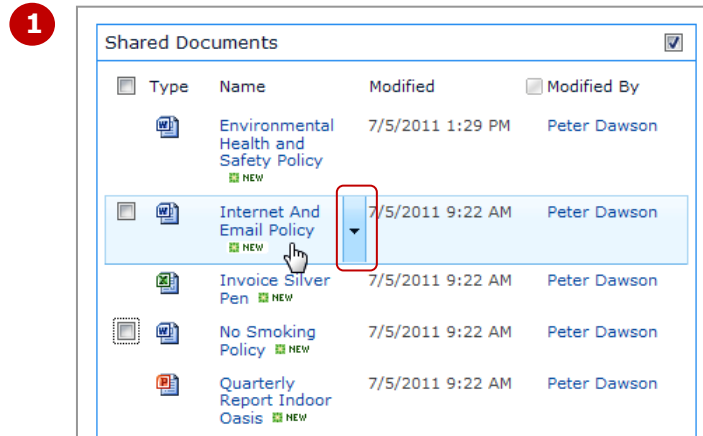
EMAILING A LINK TO A DOCUMENT

You can email a link to a single document from within a SharePoint document library. After finding the desired document, you can then use either the **E-mail a Link** tool on the ribbon or command on the drop

arrow menu to open your default email application with a new message containing the link. It's so simple you didn't even have to copy the link and paste it into the message.

Example:

- 1** We hovered over the Name of the **Internet And Email Policy** file under **Shared Documents** on the Home page to display a drop arrow to the right of the file name
- 2** Then clicked on the drop arrow to display a menu
- 3** Next we selected **Send To > E-mail a Link** (and click on **[Allow]** if a security message box displays) *A new message will open in your default email application containing a link to the document in the body of the message. You can now simply specify the recipients, type a subject and message, and send it.*
- 4** Finally we closed the email application to return to SharePoint



For Your Reference...

To **email a link** to a **document**:

1. Open the document library, then hover over the Name of the document
2. Click on the drop arrow for the file and select **Send To > E-mail a Link**
3. Complete the message and click on **[Send]**

Handy to Know...

- You can also use the ribbon to email a link to a document. To do this, click on the check box for the desired document in a document library to select the file. Click on **E-mail a Link** in the **Share & Track** group on the **Documents** tab.

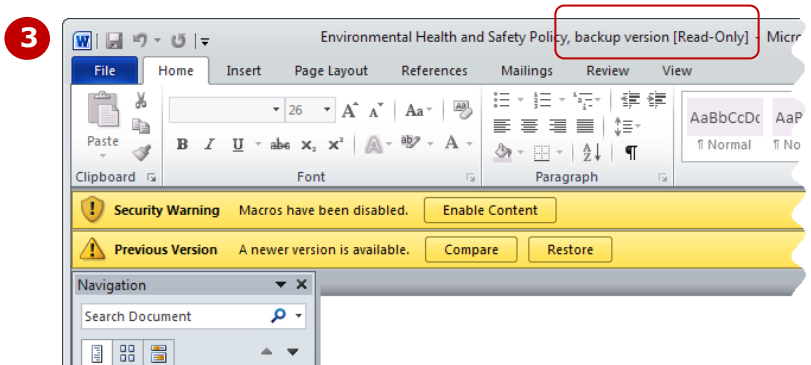
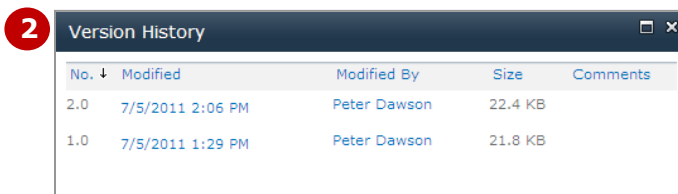
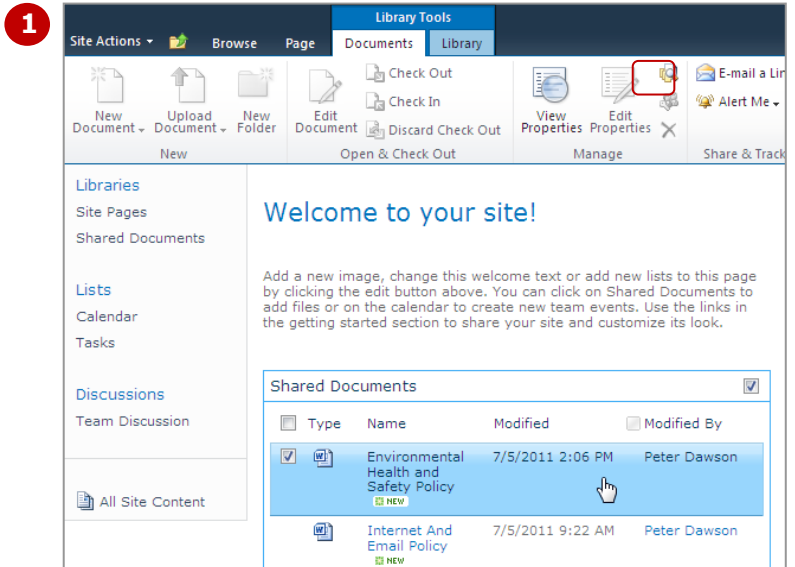
VIEWING VERSION HISTORY

Site owners can choose to switch on **versioning** for a document library. This means that each time a file in the library changes, the older version will be stored in the library as well as the latest version.

Using the **Version History** feature, you can display a list of saved versions of a selected document and from here you can open earlier versions as desired. Note that this option will not be available in all libraries.

Example:

- 1** We clicked on the check box to select the **Environmental Health And Safety Policy** file on the Home page to select this document and open the **Documents** tab
- 2** Then we clicked on **Version History** in the **Manage** group
The Version History page will display after a moment. Our example shows that we have two versions of the document – the oldest version (No. 1.0) is at the bottom of the list and has the oldest date...
- 3** Next we clicked on the date of the oldest version, then clicked on **[OK]** to open it in Word
The text 'backup version' will appear in the title bar to show that it is not the current version...
- 4** Then closed Word to return to the SharePoint site
- 5** Finally we clicked on **close** to close the **Version History** page, then deselected the document under **Shared Documents**



For Your Reference...

To **display version history information**:

1. Open the document library
2. Click on the check box to select the file
3. Click on **Version History** in the **Manage** group on the **Documents** tab
4. Click on the desired **Modified** date

Handy to Know...

- You can also access the version history via the drop arrow menu. To do this, hover over the Name of the desired document, click on the drop arrow to the right of the file name and select **Version History**.

VIEWING PROPERTIES

When you look at a document library or list in either a web part on the Home page or one of the list views, you may find that the view does not include all of the columns that have been defined for that library or

list. You can display all properties for a document library by viewing its **properties** and for a list view by displaying its **list details**.

Example:

- 1 We clicked on the check box for the **Internet And Email Policy** file on the Home page to select this document and open the **Documents** tab
- 2 Then we clicked on **View Properties** in the **Manage** group to open the **Shared Documents** dialog box for this file

An additional property – Title – will display. Let's look at the details of a list now...

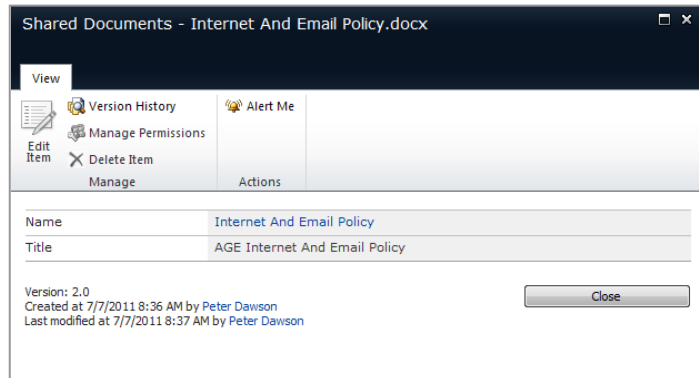
- 3 We clicked on **[Close]**, then clicked on **Tasks** in the Quick Launch bar to open the **Tasks** list

The default view of this list shows quite a few properties. But let's see if there are any others as well...

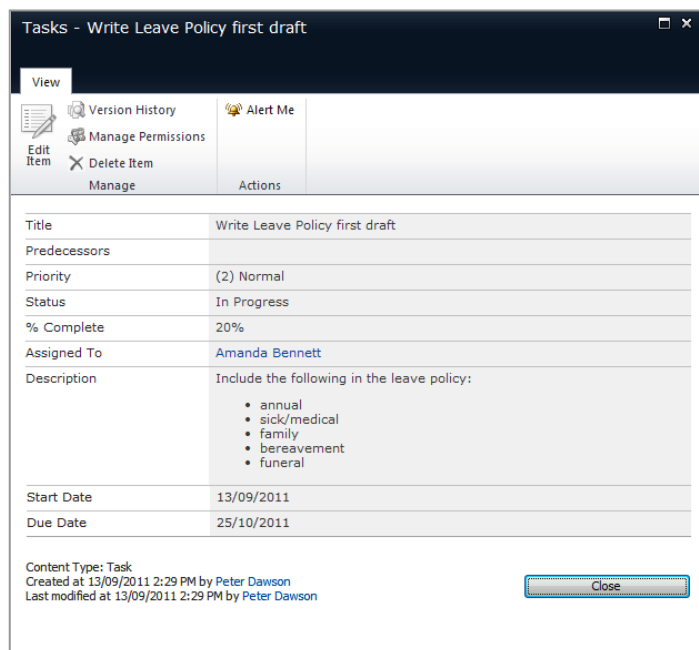
- 4 Next we clicked on the check box for the **Write Leave Policy first draft** task to display the **Items** tab, then clicked on **View Item** in the **Manage** group to open the **Tasks** dialog box

Two additional properties will display – Description and Start Date...

- 5 Finally we clicked on **[Close]**



2



4

For Your Reference...

To **view properties** for a **list** or **document library**:

1. Open the list or document library
2. Click on the check box to select the item/file
3. Click on **View Item/View Properties** in the **Manage** group
4. Click on **[Close]**

Handy to Know...

- The **Name** and **Title** properties are different. SharePoint automatically assigns a document's file name, without its file extension, as the **Name** when it is uploaded into a library. If the **Title** property is added when the file is created (i.e. in Word), it will appear in SharePoint.

CREATING AN ALERT ON A DOCUMENT OR LIST ITEM

You can set up SharePoint so that when a specific file or list item changes or is deleted, you will be notified of this change by email or SMS (if this has been allowed by your administrator). These change

notifications are known as **alerts**. This example shows how to create an alert on a file in the **Shared Documents** library, but the method for creating an alert on a list item is identical.

Example:

- 1** We clicked on the check box for the **Environmental Health And Safety Policy** file on the Home page to select this document
- 2** Then clicked on **Alert Me** in the **Share & Track** group, then selected **Set alert on this document** to open the **Shared Documents** dialog box
- 3** We changed **Alert Title** to **EHS policy alert**
- 4** We ensured that **E-mail** is selected in **Delivery Method**
In our case, it's the only available option...
- 5** Next we clicked on **Someone else changes a document** in **Send Alerts for These Changes**
Let's assume that it's imperative that you are notified as soon as any changes are made to this document...
- 6** Finally we ensured that **Send notification immediately** is selected in **When to Send Alerts**, then clicked on **[OK]**
An email will be sent to you confirming that the alert has been set up. Then, each time this document is modified in some way, you will be informed

Tip: To check whether or not you have received the email message, you must be logged onto your computer using the same user account as the account that you are using in SharePoint.

For Your Reference...

To **create** an **alert** on a **list item** or **document**:

1. Open the list or document library, then click on the check box to select item or document
2. Click on **Alert Me** in the **Share & Track** group and select **Set alert on this item/document**
3. Set the desired options and click on **[OK]**

Handy to Know...

- The available **Send Alert for These Changes** options change and are relevant to the type of list item (or document) for which you are creating the alert. For example, creating an alert on a calendar event will include the option **The time or location of an event changes**.

CREATING AN ALERT ON A LIBRARY OR LIST

In addition to creating alerts for individual items and documents, you can also create alerts on an entire list or document library. This means that you will receive a message when changes are made to the list or

library – that is, when an item is added, changed or removed. With these types of alerts, you should consider carefully when you wish to receive them.

Example:

- 1** We clicked on **Tasks** in the Quick Launch bar to open the **Tasks** list
Let's request to be alerted immediately whenever a new task that is assigned to you is added to the Tasks list...
- 2** Then clicked on the **List** tab, and clicked on **Alert Me** in the **Share & Track** group and select **Set alert on this list**
The Tasks dialog box will open...
- 3** Next we changed **Alert Title** to **New Task**
- 4** And ensured that **E-mail** is selected in **Delivery Method**
- 5** Then we clicked on **New items are added** in **Change Type**
- 6** Then clicked on **A task is assigned to me** in **Send Alerts for These Changes**
- 7** We ensured that **Send notification immediately** is selected in **When to Send Alerts**, then clicked on **[OK]**
An email will be sent to you confirming that the alert has been set up...

2

For Your Reference...

To **create** an **alert** on a **list** or **document library**:

1. Open the list or document library
2. Click on **Alert Me** in the **Share & Track** group and select **Set alert on this item/library**
3. Set the desired options and click on **[OK]**

Handy to Know...

- If you choose to be alerted immediately about all changes made to a particularly busy document library, you may find that your mailbox will become rapidly overloaded. Instead, consider receiving an alert as either a daily or weekly summary.

MANAGING YOUR ALERTS

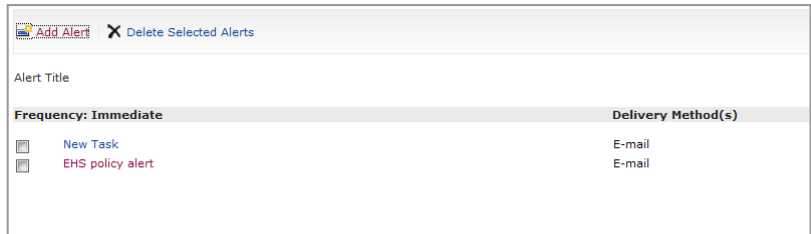
You may initially think that it's a great idea to receive alerts whenever a change is made. But if you find that your Inbox is being swamped with alert messages, you can easily edit an alert using the **My**

Alerts on this Site page. You can access this page from almost every page, library and list in your site, and using this page you can edit, delete and add new alerts.

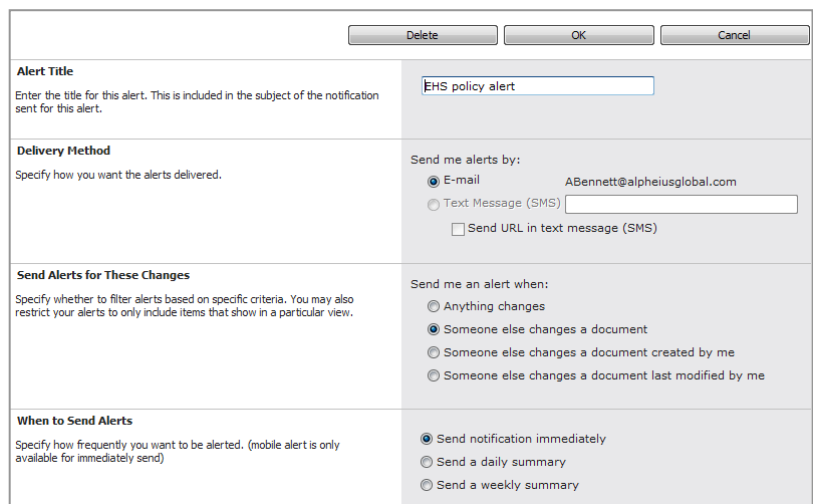
Example:

Changing the frequency for the alert that we created on a document in the Shared Documents library...

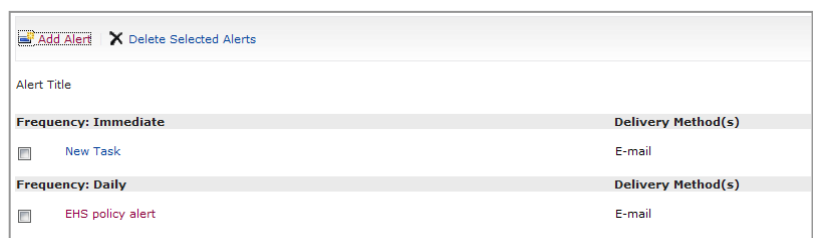
- 1** We clicked on the **Page** tab, then clicked on **Alert Me** in the **Share & Track** group and selected **Manage My Alerts** to open the **My alerts on this Site** page
You can access the Alert Me tool on many ribbon tabs...
- 2** We clicked on **EHS policy alert** to open the **Edit Alert** page
- 3** Finally we clicked on **Send a daily summary** in **When to Send Alerts**, then clicked on **[OK]**
Now you will receive only one email a day summarising the changes made to the document...



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For Your Reference...

To **manage** your **alerts**:

1. Click on a tab such as **Page, Documents, Library, Items, List, Events, Calendar** etc
2. Click on **Alert Me** in the **Share & Track** group and select **Manage My Alerts**
3. Select the alert and change as desired

Handy to Know...

- You can also access the **My alerts on this Site** page by clicking on the link at the bottom of the confirmation email message that you received when you created the alert.
- You can add new alerts from the **My alerts on this Site** page by clicking on **Add Alert** and then clicking on the list or **View this list**.

CONCLUDING REMARKS

Congratulations!

You have now completed the **Documents and lists** 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**