

SharePoint Team Sites

Microsoft SharePoint 2010 is a web application platform. All SharePoint sites are basically websites as they require a URL and are accessed through a web browser. DePaul University's implementation is server based and have two basic types, but you'll be working with will be collaborative sites that are most often referred to as "team sites". The SharePoint team site is a collaboration tool where communities of users will share documents, calendars, tasks and provide announcements. It is a content management system. The recommended web browser would be Internet Explorer.



Navigating Your Team Site

The best way to learn the navigation of your site may be to just start exploring. Enter your URL and sign into your team site using your Campus Connection user ID and password. Your first stop the Home tab. Here are the majority of navigation tools and paths from your team site home.

The screenshot shows a SharePoint Team Site home page with several navigation elements highlighted by red callouts:

- Site Actions**: A dropdown menu in the top left corner.
- Breadcrumb Navigation**: A path showing the current location within the site.
- Ribbon**: The main navigation bar at the top of the page.
- Site Search**: A search box in the top right corner.
- Quick Launch Bar**: A vertical navigation bar on the left side of the page.

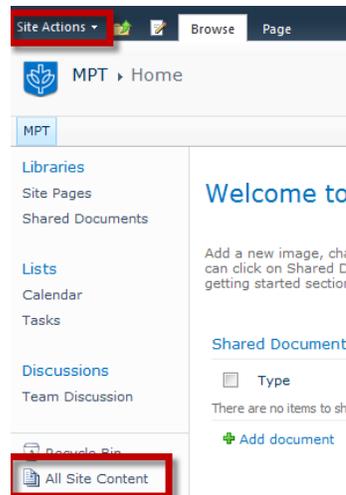
The page content includes a "Welcome to your site!" message, a "Shared Documents" section with a table of documents, and a "Getting Started" section with links for "Share this site", "Change site theme", "Set a site icon", and "Customize the Quick Launch".

Introduction: Understanding Libraries and Lists

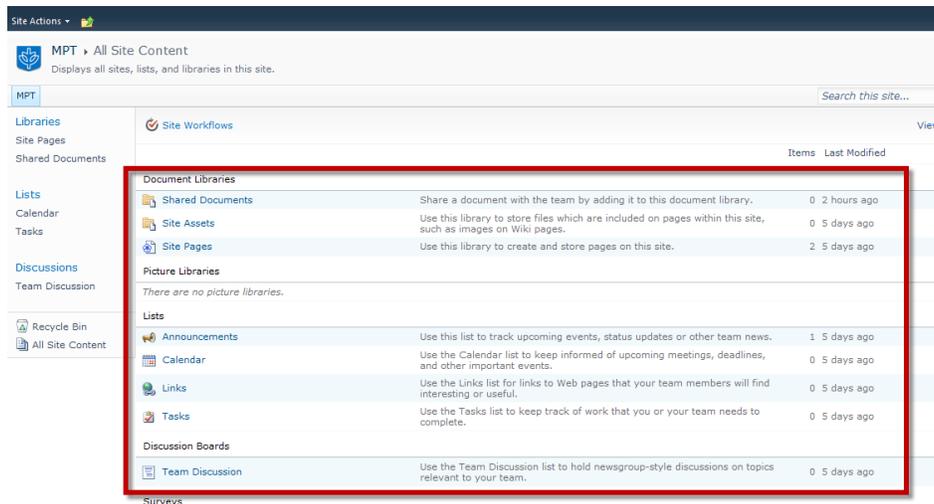
Your site is essentially made up of a collection of lists and libraries. The terminology is confusing. A Library is a collection of items such as Word documents, PDF files, Excel spreadsheets, and images. The Library is the place where site Members and Owners can upload files to share with each other and site visitors can only view. A List is an element that contains items such as announcements, calendars, tasks, and contacts.

What content is contained in site can be found by:

1. Clicking the **All Site Content** link (or.....click the **Site Actions** menu then **View All Site Content**)



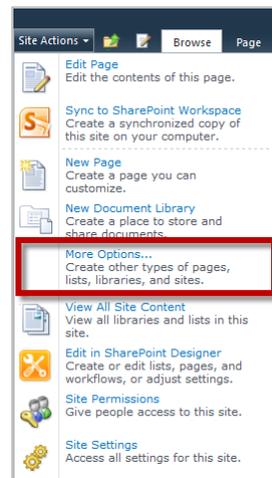
2. The following screen will appear and will provide you access to what is contained in your site. All of the default elements have been created because SharePoint assumes that these are elements that you'll want to use. They are easily deleted, which will be cover later in this quick guide.



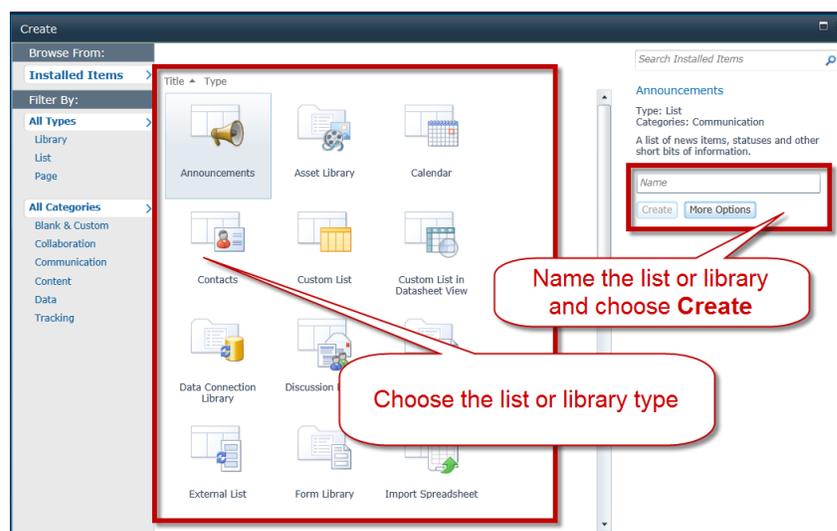
Creating a List or Library (Owner's Only)

Again, Lists and Libraries are pieces or parts of a site. To create new lists and libraries follow these steps below:

1. Go to **Site Actions**
2. Choose **More Options** (More Options... will reveal all of the items that can be created for a site)

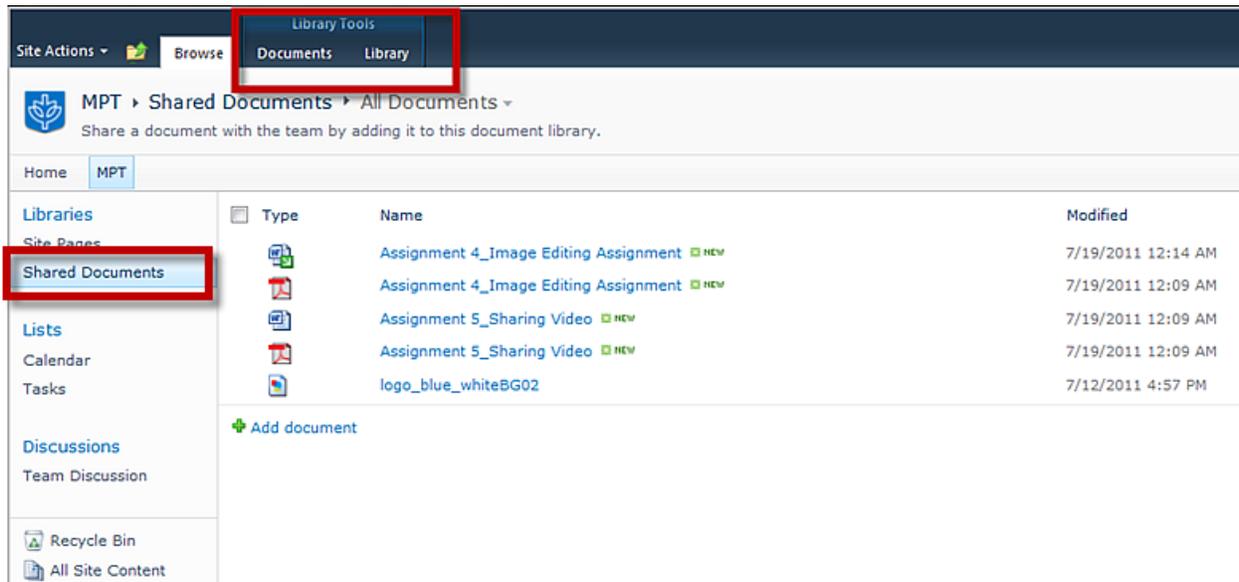


3. Choose the List or Library type as shown below (if you do not have Microsoft Silver light installed then the window options shown below will appear as listed links instead of icons).
4. Name the new List or Library



Using a Library (Members and Owners Only)

Once you have navigated to a library in your site, you'll notice the Documents and Library tabs above the ribbon when the library is selected.



1. **The Library Tab** – Allows you to change things about the entire library such as deleting the library and controlling the other library settings



Site Actions ▾

MPT ▸ Shared Documents ▸ Document Library Settings

Home MPT

Libraries
Site Pages
Shared Documents

Lists
Calendar
Tasks

Discussions
Team Discussion

Recycle Bin
All Site Content

List Information

Name: Shared Documents
Web Address: http://teams.depaul.edu/is/services/mpt/Shared Documents/Forms/AllItems.aspx
Description: Share a document with the team by adding it to this document library.

General Settings	Permissions and Management	Communications
Title, description and navigation Versioning settings Advanced settings Validation settings Column default value settings Rating settings Audience targeting settings Metadata navigation settings Per-location view settings Form settings	Delete this document library Save document library as template Permissions for this document library Manage files which have no checked in version Workflow Settings Generate file plan report Enterprise Metadata and Keywords Settings Information management policy settings	RSS settings

2. **The Document Tab** - Allows you to work with the documents in your library. This includes opening, uploading, deleting, and creating documents.

Site Actions ▾ Browse Library Tools

Documents Library

Dekuiper, Colin ▾

New Document Upload Document New Folder Edit Document Check Out Check In View Properties Edit Properties Version History Document Permissions E-mail a Link Alert Me Download a Copy Manage Copies Workflows Publish Unpublish Approve/Reject I Like It Tags & Notes

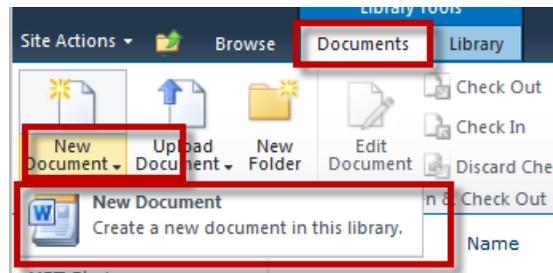
Open & Check Out Manage Share & Track Copies Workflows Cancel Approval

Type	Name	Modified	Modified By
<input checked="" type="checkbox"/>	Assignment 4_Image Editing Assignment NEW	7/19/2011 12:14 AM	Dekuiper, Colin
<input checked="" type="checkbox"/>	Assignment 4_Image Editing Assignment NEW	7/19/2011 12:09 AM	Dekuiper, Colin
<input checked="" type="checkbox"/>	Assignment 5_Sharing Video NEW	7/19/2011 12:09 AM	Dekuiper, Colin
<input checked="" type="checkbox"/>	Assignment 5_Sharing Video NEW	7/19/2011 12:09 AM	Dekuiper, Colin
<input type="checkbox"/>	logo_blue_whiteBG02	7/12/2011 4:57 PM	Dekuiper, Colin

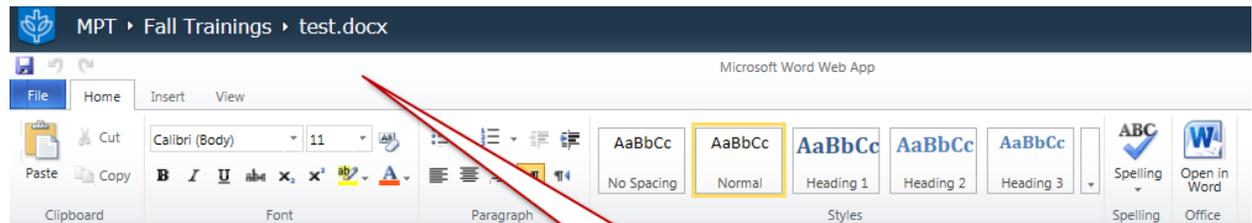
+ Add document

Creating New Documents (Members and Owners only)

Go to the **Documents Tab** of a library and choose **New Document**. This will open a new window where you can name the new file and then open a Word document by default in the Web browser (this default setting can be changed).



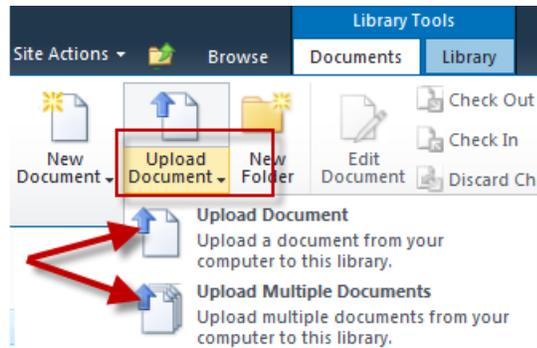
Name the document:



The blank document opens by default like this within your Internet Explorer browser/SharePoint site

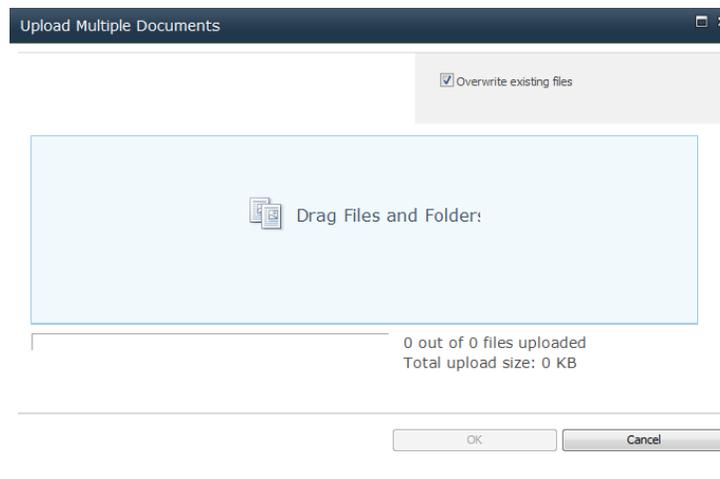
Uploading Documents (Members and Owners only)

Go to the **Documents Tab** of a library and choose the drop down menu for the **Upload Document** icon. This will allow for choosing between uploading a single document or multiple documents at one. (If the Upload Multiple Documents option is unavailable, make sure that you are using Internet Explorer as your browser)



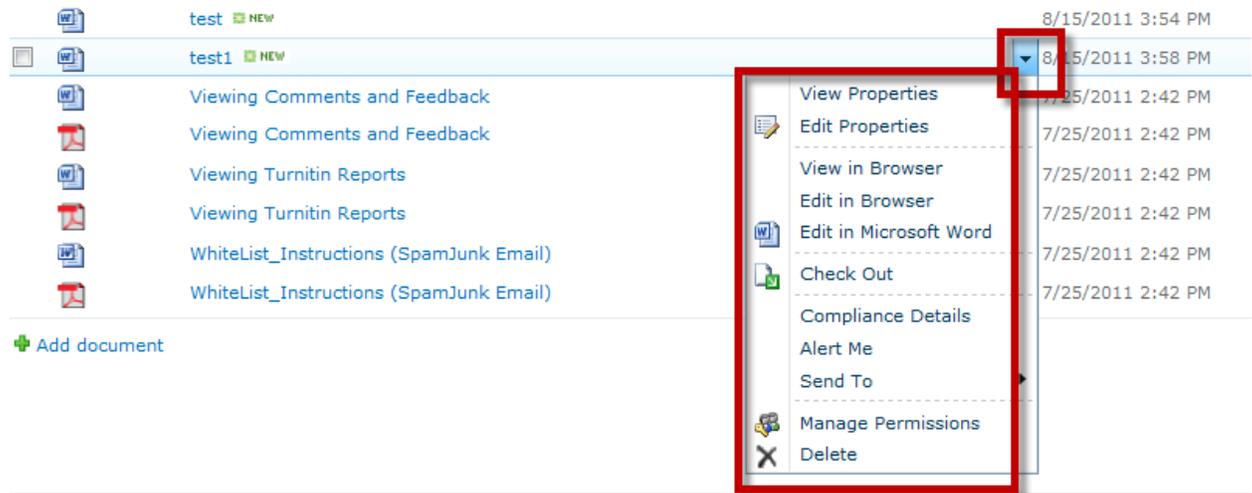
Uploading Multiple Documents (Members and Owners only)

If you select **Upload Multiple Documents**, you will have the ability to select multiple files or drag multiple files and folders to that document library from your computer. (The view shown below is dependent on having Windows 7 as an operating system and Microsoft Silver light installed). You will need to have Windows Explorer open and locate the documents or you can select a whole file folder.



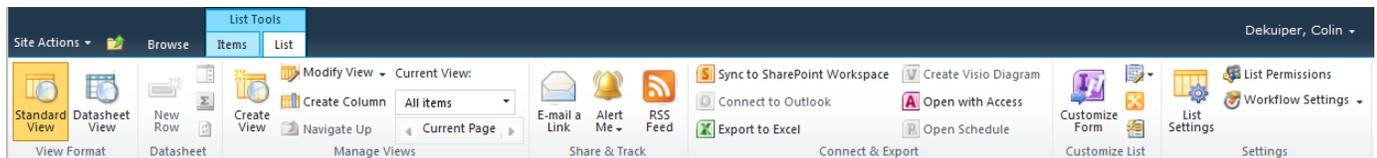
Accessing Document Editing Features (Members and Owners only)

Select a document and use the drop down as you hover over that document in the list to access the editing features.



Using a List (Members and Owners Only)

Once you have navigated to a list in your site, you'll notice that each type of list has their own set of tabs above the ribbon when the list is selected. These tabs will vary, but most often you will find:



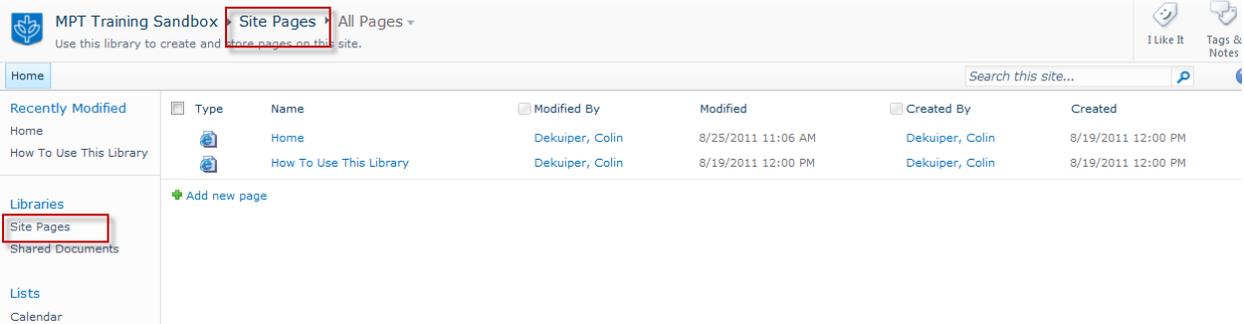
The List Tab – This tab, like the library tab, will provide you access to tools that involve working with the list as a whole

The Items Tab – This tab, like the documents tab, will provide you access to working with the individual items for the list

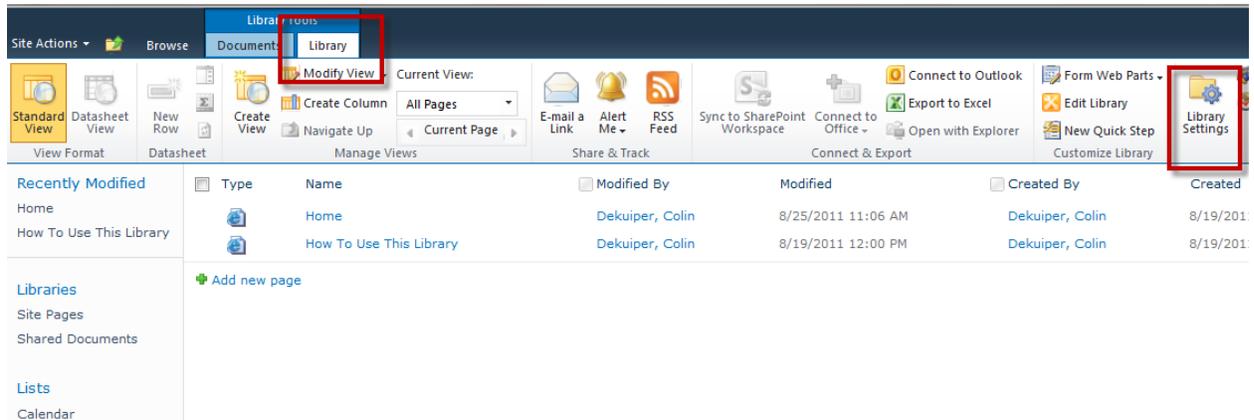
Deleting a List or Library (Owners Only)

To delete a list or a library:

1. Select the list or library to be deleted by clicking on it from the Quick Launch Navigation as shown below (you will now see that you are within the list or library by looking at the breadcrumb navigation at the top of the page. Here the Site Pages library has been chosen).



2. Click the **Library** tab
3. Click the **Library Settings** icon



4. Click **Delete this document library** link

List Information

Name: Site Pages
 Web Address: http://teams.depaul.edu/is/services/mpt/sandbox/SitePages/Forms/AllPages.aspx
 Description: Use this library to create and store pages on this site.

General Settings Permissions and Management Communications

[Title, description and navigation](#) **Delete this document library** [RSS settings](#)

[Versioning settings](#)
[Advanced settings](#)
[Validation settings](#)
[Column default value settings](#)
[Rating settings](#)
[Audience targeting settings](#)
[Metadata navigation settings](#)
[Per-location view settings](#)
[Form settings](#)

[Permissions for this document library](#)
[Manage files which have no checked in version](#)
[Workflow Settings](#)
[Generate file plan report](#)
[Enterprise Metadata and Keywords Settings](#)
[Information management policy settings](#)

Using the Recycle Bin

If you have accidentally delete a document, item, or even a whole list or library then you can still retrieve these items from the site recycle bin. Items in the recycle bin are stored for 30 days. To access the recycle bin:

1. Go to the **Quick Launch** pane for the site
2. Click on the link for the **Recycle Bin** at the bottom of the Quick launch pane

Editing Your Team Site Home (Members and Owners Only)

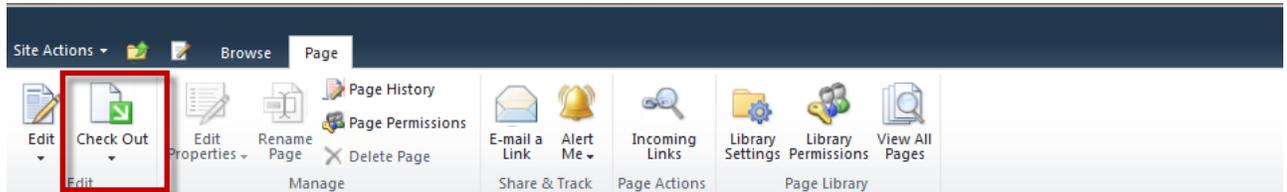
Your Team Site Home page can be customized to reflect the purpose of your site and the people using it. However, to edit this page you must “check out” the page to edit it. Think of this as making draft copy that you will edit separately and eventually replace the current version with.

While you have the page checked out, other users will still have access to the site and will see the previous page exactly as it was when you checked it out. A member or owner will also see a yellow status bar below the ribbon that will say that the page is exclusively checked out to you. Only **ONE** member can have a page checked out a time. An owner can also override the checkout from another member or owner.

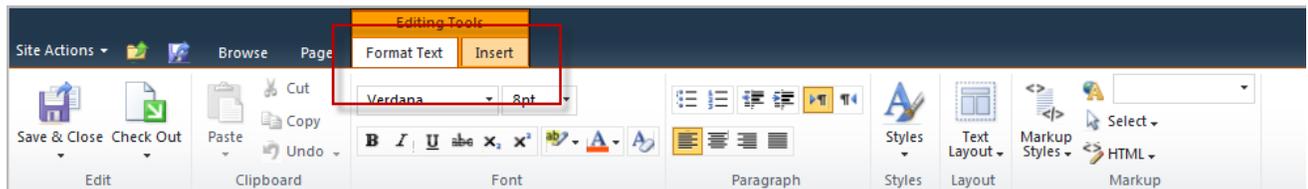
Checking Out/Checking In (Members and Owners Only)

To begin editing the page, check the page out by:

1. Going to the **Page** tab



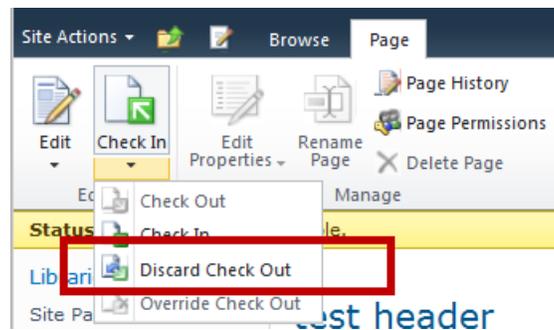
2. After checking the page out, click the **Edit** icon to begin editing the page. This will reveal the **Format Text** and **Insert** tabs above that ribbon that will allow for editing the page.



Discard a Page Check-Out (Members and Owners)

To discard all changes and check the page back in:

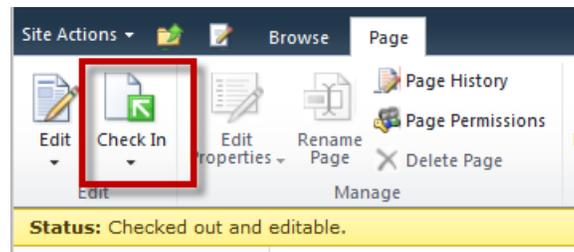
1. Go to the **Page** menu tab
2. Click the down arrow underneath check- in and select **Discard Check Out**.



Check-In a Page (Members and Owners)

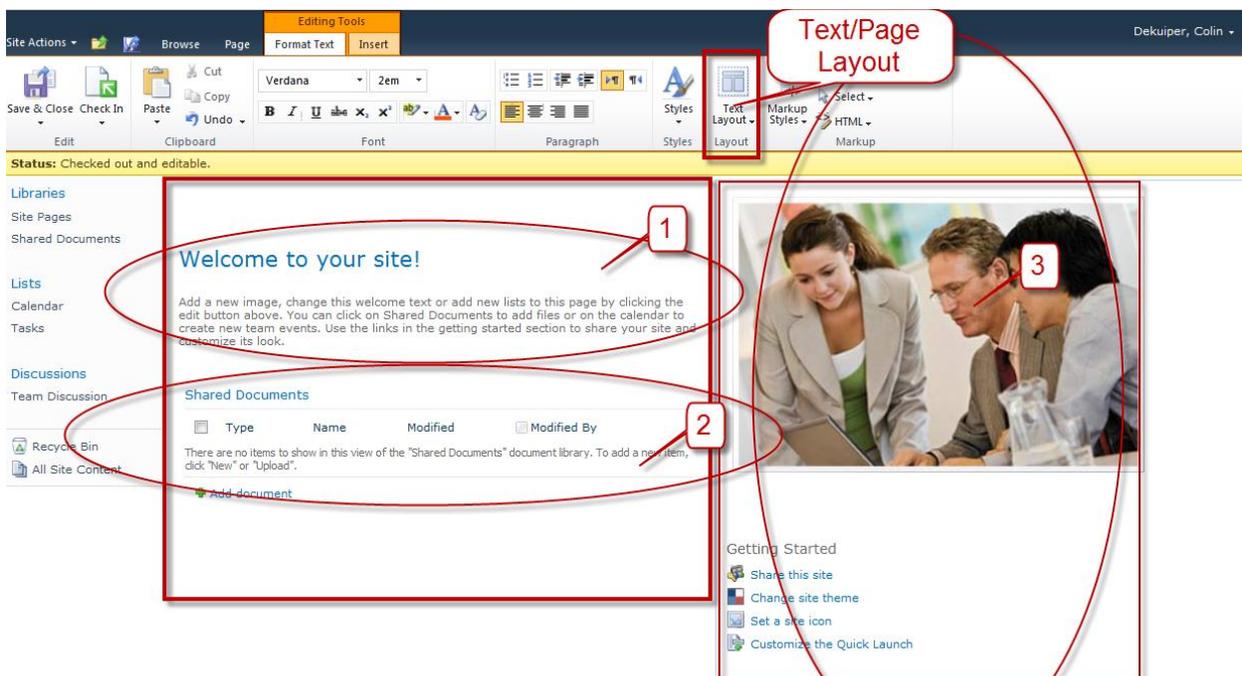
To keep and publish all changes to the site:

1. Go to the Page menu tab and click **Check-In**.



Editing Your Homepage (Members and Owners)

The editable parts of your homepage are shown in the image below and defined underneath. There are 3 pieces currently shown. Again, always make sure that you have the page checked and are in edit mode to make changes to a page.



Text/Page Layout – The current page is using a two column layout. This can be changed. A word of caution with changing the text layout is that SharePoint will do its best to preserve what already exists on a page, but changing from a complex layout to a simple layout or vice versa may not transition so easily. For example, changing a three column layout with headers and footers to a two column layout will mean that your headers and 3rd column will most definitely, and possibly oddly, end up in one of your two columns.

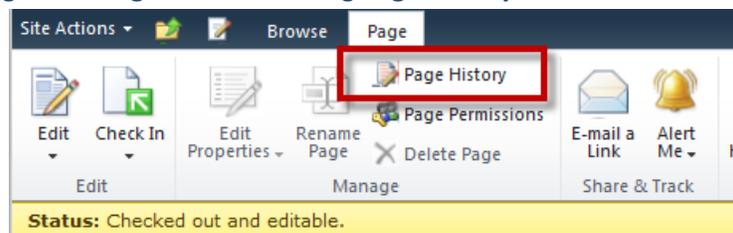
1. The content shown here is just basic text that can be added and formatted using the controls within the Format Text menu tab

- In this area, a Web Part has been added. Web parts are a self-contained piece of something that already exists in your site. Think of them as like a feed of something straight to your homepage. For example, you could building an Announcements List in SharePoint (as a List) and then include that list on the front page of your site by inserting it as a web part. Web parts can be added from within the Insert Menu tab.
- The content shown here is just an image that can be modified, deleted, and replaced using the Insert menu tab and the controls within it.

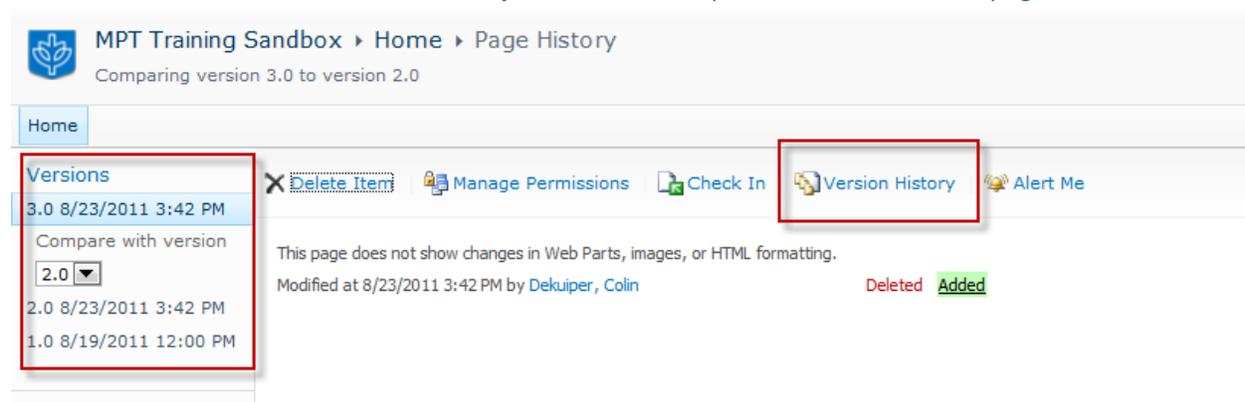
Understanding Versioning (Members and Owners)

When you have checked a page back in, a new version of that page has been created. To see the list of pages that are saved in the site we will need to access the Version History by:

- Going to the **Page Tab** and clicking **Page History**



- This will bring you to the history page for the Home page.
- Here you will see the number versions to the left and an initial view of the tracking changes that were made in the most recent version for comparison with which ever version you select in that drop down menu.
- Select the **Version History** to roll back to a previous version of the page



- Here you will see a list of all the published versions of the Home page. You have the ability to see who created that page, comments that they left, and you can also roll over the time and date of that particular version and either view it or restore it as the

published version. If you restore the page, that will create a copy or new version and will be what is seen when users log into the site.

The screenshot displays a version control interface with a table of page versions and a preview of the page content. The table has columns for 'No.', 'Modified', 'Modified By', 'Size', and 'Comments'. The current version is 3.0, modified on 8/23/2011 3:42 PM by Dekuiper, Colin, with a size of 4.7 KB. A previous version, 2.0, is also shown, modified on 8/23/2011 3:42 PM by Dekuiper, Colin, with a size of 4.7 KB. A 'Restore' button is visible next to version 2.0. The 'Comments' column for version 2.0 contains the text 'add test header'. Below the table, the page content is previewed, showing a 'Welcome to your site!' message and instructions on how to edit the page. A 'test header' label is overlaid on the preview area.

No.	Modified	Modified By	Size	Comments
3.0	8/23/2011 3:42 PM	Dekuiper, Colin	4.7 KB	
2.0	8/23/2011 3:42 PM	Dekuiper, Colin	4.7 KB	add test header
1.0	8/19/2011 12:00 PM	Dekuiper, Colin	4.7 KB	

test header

Welcome to your site!

Add a new image, change this welcome text or add new lists to this page by clicking the edit button above. You can click on Shared Documents to add files or on the calendar to create new team events. Use the lin...

Wiki Content

Welcome to your site!

...