

# INTRO TO SHAREPOINT

*Department of Technology Enhanced Learning  
Information Technology Systems Division*

## TOPICS COVERED

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Updated 7/08

|                                                  |    |
|--------------------------------------------------|----|
| What is SharePoint? .....                        | 2  |
| The SharePoint Window.....                       | 3  |
| Using the Quick Launch Bar .....                 | 4  |
| What is "My Site"? .....                         | 4  |
| Creating an Announcement .....                   | 5  |
| Adding a Link .....                              | 6  |
| Creating an Event .....                          | 7  |
| Creating a Task .....                            | 8  |
| Working with List and Document Views .....       | 9  |
| Creating a New Folder.....                       | 10 |
| Opening and Editing a Document .....             | 11 |
| Checking Out a Document .....                    | 12 |
| Checking In a Document .....                     | 13 |
| Uploading a Document .....                       | 14 |
| Creating an Alert .....                          | 15 |
| Searching a Site .....                           | 15 |
| Creating a New Discussion Thread.....            | 16 |
| Reading and Replying to a Discussion Thread..... | 17 |
| Using a Blog Site.....                           | 18 |
| Using a Wiki Site.....                           | 20 |
| Pictures.....                                    | 22 |
| Using the Recycle Bin .....                      | 25 |
| Viewing User Information .....                   | 26 |
| Getting Help .....                               | 26 |



## What is SharePoint?

Microsoft SharePoint is a browser-based collaboration and document management platform from Microsoft. It is used to host web sites that access shared workspaces and documents, as well as specialized applications like wikis and blogs from a browser.

ITSD has implemented this system in order to better provide the UNCW community with a place for collaboration within departments, as well as interdepartmentally across campus.



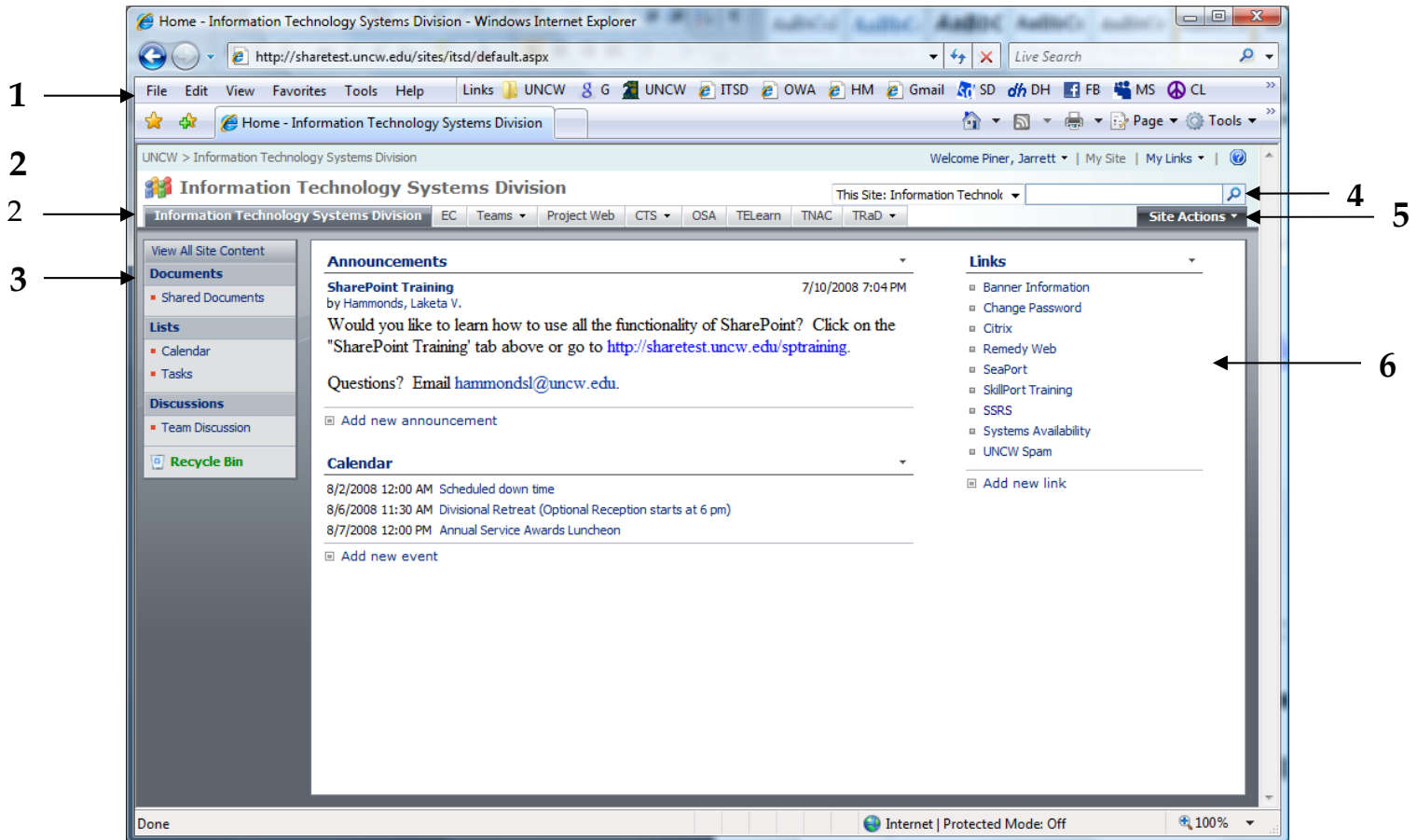
In order to access the UNCW SharePoint Homepage, open an Internet browser and go to the following site:

<http://share.uncw.edu>

# Getting Started

## The SharePoint Window

When you go to a SharePoint page, you will see the following:



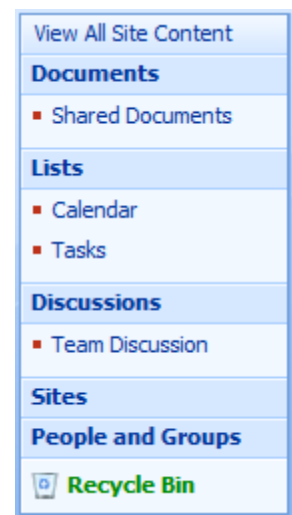
1. **Browser Toolbars** - allows the user to navigate in the browser.
2. **Link Bar** - contains shortcuts for common actions and features.
3. **Quick Launch Bar** - contains shortcuts to common content areas of the SharePoint site.
4. **Search** - allows the user to search the site for information.
5. **Site Action Button** - contains shortcuts to create items, customize the page, and change site settings (*Note: Only people with the necessary permissions will see this option*).
6. **Web Part** - contains content information. Web parts are the containers of information that make up the site.

*Note* - All SharePoint pages are highly customizable which means that your particular page may not look exactly like the one listed above.

## Using the Quick Launch Bar

By default, the following content areas are located on the Quick Launch bar:

- ❖ **Documents** - contains document libraries that contain document files related to a specific group or subject.
- ❖ **Lists** - contains shared information. The default lists are Calendar and Tasks.
- ❖ **Discussions** - contains discussion boards that allow users to post messages and comments in a chronological format.
- ❖ **Sites** - contains collaboration area such as team sites, workspaces, blog sites, and wiki sites.
- ❖ **People and Groups** - contains links to groups and users.
- ❖ **Recycle Bin** - contains deleted file information



*Note* - To quickly view site contents and details, click the *View All Site Content* shortcut at the top of the Quick Launch bar.

## What is "My Site"?

*My Site* contains a public and a private page. *My Home* page is your personal page which contains your private information and files. *My Profile* page is your public page where other users can view and share your files and information. To access *My Site*, click the *My Site* shortcut in the upper-right corner of the *Home* page.

*Note* - ITSD currently teaches a separate workshop that covers "My Site".

## Creating an Announcement

1. From the Home page, click the *Add new announcement* shortcut at the bottom of the *Announcements* web part.

### Announcements

There are currently no active announcements. To add a new announcement, click "Add new announcement" below.

[Add new announcement](#)

2. Enter a title for the announcement in the *Title* box.
3. *Optional* - Enter text for the announcement in the *Body* box.
4. *Optional* - Enter an expiration date in the *Expires* box.
5. *Optional* - To attach a file to the announcement, click the *Attach File* shortcut. Click the *Browse* button and locate and select the file you want to attach. Click the *Open* button and click the *OK* button.
6. Click the *OK* button when you are finished.

*Note* - you can also click the *Lists* shortcut on the *Quick Launch* bar and select the list type to create a new list item.

### Announcements: New Item

OK Cancel

Attach File | Spelling...

\* indicates a required field

Title \*

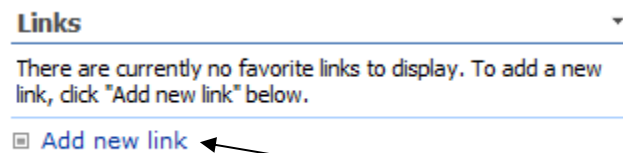
Body

Expires

OK Cancel

## Adding a Link

1. From the *Home* page, click the *Add new link* shortcut at the bottom of the *Links* web part.



2. Enter a URL for the Web site you want to link to in the *Type the Web address* box. (Note - You can verify that a link is valid by clicking the *Click here to test* shortcut)
3. *Optional* - Enter a description for the link in the *Type the description* box.
4. *Optional* - Enter notes for the link in the *Notes* box.
5. Click the *OK* button when you are finished.

**Links: New Item**

OK Cancel

ABC Spelling... \* indicates a required field

**URL \*** Type the Web address: (Click here to test)

http://

Type the description:

**Notes**

OK Cancel

## Creating an Event

1. From the *Home* page, click the *Add new event* shortcut at the bottom of the *Calendar* web part.

### Calendar

8/2/2008 12:00 AM Scheduled down time

8/6/2008 11:30 AM Divisional Retreat (Optional Reception starts at 6 pm)

8/7/2008 12:00 PM Annual Service Awards Luncheon

 [Add new event](#)

2. Enter a title for the event in the *Title* box.
3. *Optional* - Enter a location for the event in the *Location* box.
4. Enter or select a start date and time in the *Start Time* boxes.
5. Enter or select an end date and time in the *End Time* boxes.
6. *Optional* - Enter a description for the event in the *Description* box.
7. *Optional* - Check the *Make this an all-day activity that doesn't start or end at a specific hour* box.
8. *Optional* - Check the *Make this a repeating event* box and select repeat options.
9. *Optional* - Check the *Use a Meeting Workspace to organize attendees, agendas, documents, minutes, and other details for this event* box.
10. Click the *OK* button when you are finished.

**Note** - If you selected to create a meeting workspace, make selections, enter information in the *New Meeting Workspace* page, and click the *OK* button.

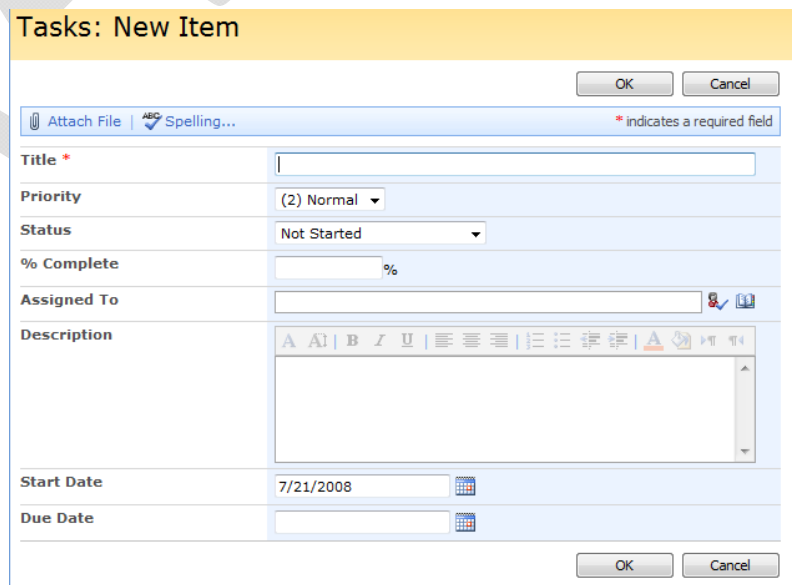
**Calendar: New Item**

 [Attach File](#) |  [ABC Spelling...](#) \* indicates a required field

|                      |                                                                                                                                        |
|----------------------|----------------------------------------------------------------------------------------------------------------------------------------|
| <b>Title *</b>       | <input type="text"/>                                                                                                                   |
| <b>Location</b>      | <input type="text"/>                                                                                                                   |
| <b>Start Time *</b>  | 7/21/2008  9 AM 00                                |
| <b>End Time *</b>    | 7/21/2008  9 AM 00                                |
| <b>Description</b>   | <div> <div> A A1 B I U </div> <div> </div> </div> <input type="text"/>                                                                 |
| <b>All Day Event</b> | <input type="checkbox"/> Make this an all-day activity that doesn't start or end at a specific hour.                                   |
| <b>Recurrence</b>    | <input type="checkbox"/> Make this a repeating event.                                                                                  |
| <b>Workspace</b>     | <input type="checkbox"/> Use a Meeting Workspace to organize attendees, agendas, documents, minutes, and other details for this event. |

## Creating a Task

1. Click the *Tasks* shortcut in the *Lists* section of the *Quick Launch* bar.
2. Click the *New* button (  ).
3. Enter a title for the task in the *Title* box.
4. *Optional* - Click the arrow on the *Priority* box and select a priority from the resulting menu.
5. *Optional* - Click the arrow on the *Status* box and select a status from the resulting menu.
6. *Optional* - Enter a number value in the *% Complete* box.
7. *Optional* - Enter a user name or names in the *Assigned To* box.
8. *Optional* - Enter a description of the task in the *Description* box.
9. *Optional* - Enter a start date in the *Start Date* box.
10. *Optional* - Enter a due date in the *Due Date* box.
11. Click the *OK* button when you are finished.



**Tasks: New Item**

OK Cancel

Attach File | Spelling... \* indicates a required field

Title \*

Priority (2) Normal

Status Not Started

% Complete  %

Assigned To

Description

Start Date 7/21/2008

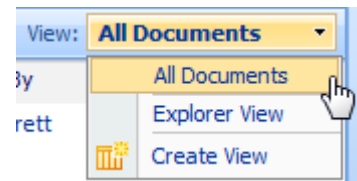
Due Date

OK Cancel

## Working with List and Document Views

1. Click the *Lists* or *Documents* shortcut on the *Quick Launch* bar.
2. Select the list or library that contains the information you want to view.

3. Click the arrow on the *View* box and do one of the following:



- a) *To change the view* - select the view from the resulting menu.
- b) *To edit the current view* - select *Modify this View* from the resulting menu. Make changes to the view and click the *OK* button.
- c) *To create a list or document view* - select *Create View* from the resulting menu. Select a view format. Enter a name for the view in the *View Name* box, select options, and click the *OK* button.

### Create View: Shared Documents

Use this page to select the type of view you want to create for your data.

#### Choose a view format



##### Standard View

View data on a Web page. You can choose from a list of display styles.



##### Datasheet View

View data in an editable spreadsheet format that is convenient for bulk editing and quick customization.



##### Calendar View

View data as a daily, weekly, or monthly calendar.



##### Gantt View

View list items in a Gantt chart to see a graphical representation of how a team's tasks relate over time.



##### Access View

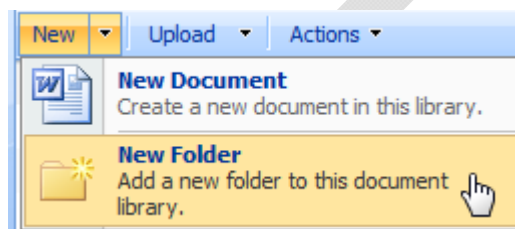
Start Microsoft Office Access to create forms and reports that are based on this list.

#### Start from an existing view

■ All Documents

## Creating a New Folder

1. Click the *Documents* shortcut on the *Quick Launch* bar.
2. Select the library you want to add a new folder in.
3. Click the arrow on the *New* button and choose *New Folder*.



4. Enter a name for the folder in the *Name* box.

### New Folder: Shared Documents

A screenshot of the 'New Folder' dialog box in SharePoint. The dialog has a yellow header bar with the text 'New Folder: Shared Documents'. Below the header, there are 'OK' and 'Cancel' buttons. A 'Spelling...' checkbox is visible on the left. The main area contains a text box labeled 'Name \*' with a red asterisk indicating it is a required field. The text box is empty. At the bottom right, there are 'OK' and 'Cancel' buttons. A legend on the right side of the dialog states '\* indicates a required field'.

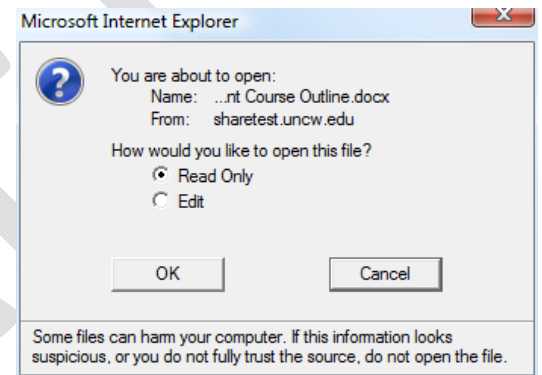
5. Click the *OK* button when you are finished.

## Documents

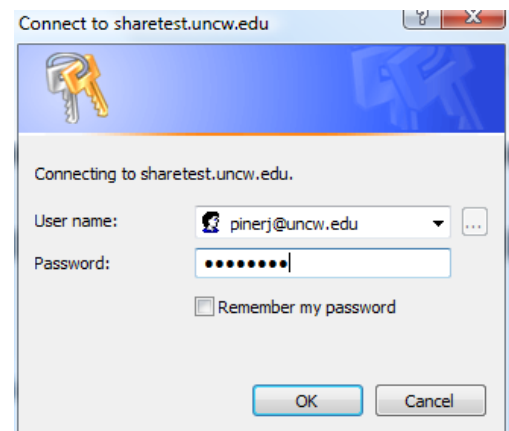
### Opening and Editing a Document

1. Click the *Documents* shortcut on the *Quick Launch* bar.
2. Select the library that contains the document you want to open.
3. Click the name of the Office document you want to open.
4. In the dialog box that appears, do one of the following:

- a. To edit the document, select *Edit*.
- b. To open the document, select *Read Only*.



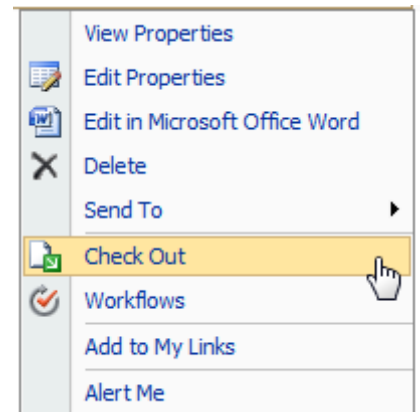
5. Click the *OK* button (*Note* - you may be asked to enter your password to open the file).
6. *Optional* - Make desired changes to the document.
7. When you are finished, click the *Save* (  ) button on the *Quick Access* toolbar.
8. Click the *Close* button (  ) to close the document.



## Checking Out a Document

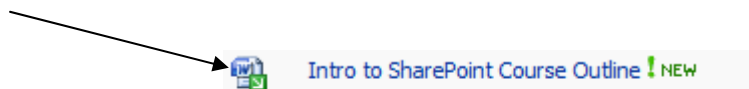
If you want to be the only user that can make changes to a document, you need to check the document out. In order to do so, follow these directions:

1. Click the *Documents* shortcut on the *Quick Launch* bar.
2. Select the library that contains the document you want to check out.
3. Place your mouse pointer over the document name of the document you want to check out.
4. Click the *Edit* arrow and select *Check Out* from the resulting menu.



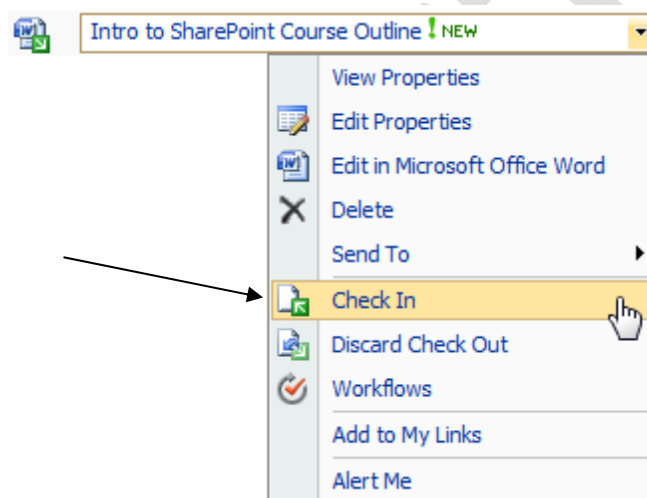
5. Click the *OK* button.

*Note* - A check out icon will appear next to the document to show that it is checked out.



## Checking In a Document

1. Click the *Documents* shortcut on the *Quick Launch* bar.
2. Select the library that contains the document you want to check in.
3. Place your mouse pointer over the name of the document you want to check in.
4. Click the *Edit* arrow and select *Check In* from the resulting menu.

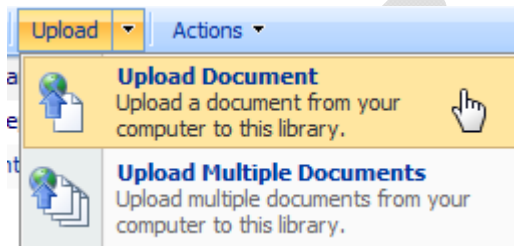


5. Select *Yes* or *No* in the *Keep the document checked out after checking in this version* section.
6. *Optional* - Enter comments in the *Comments* box.
7. Click the *OK* button.
8. Click the *Yes* button in the dialog box that appears.

**Note** - To check in a file and discard any changes that were made, place your mouse pointer over the document name of the document you want to check in. Click the *Edit* arrow and select *Discard Check Out* from the resulting menu. Click the *OK* button.

## Uploading a Document

1. Click the *Documents* shortcut on the *Quick Launch* bar.
2. Select the library you want to upload the document to.
3. Click the arrow on the *Upload* button.



4. Do one of the following:
  - a. *To upload one document* - select *Upload Document* from the resulting menu. Click the *Browse* button, locate and select the document you want to upload, and click the *Open* button. Click the *OK* button. Make changes to document properties and click the *OK* button.

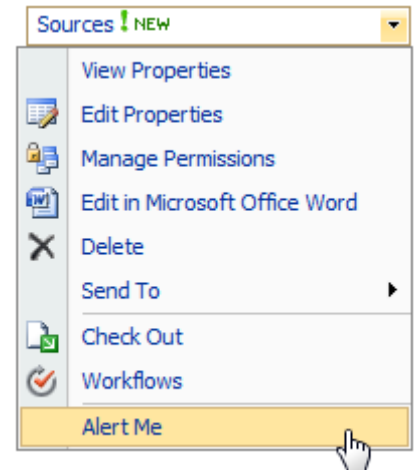
### Upload Document: Shared Documents

A screenshot of the 'Upload Document' dialog box. The dialog box has a title bar 'Upload Document' and a subtitle 'Browse to the document you intend to upload.' On the right side, there is a 'Name:' label, a text input field, and a 'Browse...' button. Below the input field, there is a link 'Upload Multiple Files...' and a checkbox labeled 'Overwrite existing files' which is checked. At the bottom right, there are 'OK' and 'Cancel' buttons.

- b. *To upload multiple documents* - select *Upload Multiple Documents*. Select the location that contains the documents you want to upload. Check the box next to the document name for each document you want to upload. Continue until you have checked all of the documents you want to upload. Click the *OK* button.

## Creating an Alert

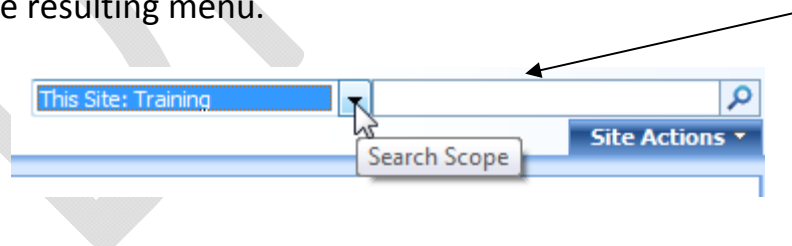
1. Open the library or list that contains the item that you want to create an alert for.
2. Do one of the following:
  - a. *To create an alert for a calendar item* - click the event name and click the *Alert Me* shortcut.
  - b. *To create an alert for another item* - place your mouse pointer over the item. Click the *Edit* arrow and select *Alert Me* from the resulting menu.
3. Select options for the alert or leave default options.



Click the *OK* button when you are finished.

## Searching a Site

1. Click the arrow on the *Search Scope* box and select what you want to search for from the resulting menu.

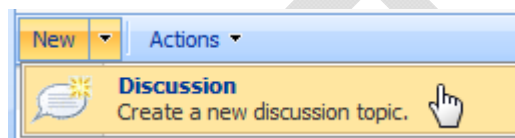


2. Enter what you want to search for in the *Enter search words* box.
3. Click the *Go Search* button (*Note* - your results will be displayed in the search results page).
4. Click the item or document name to open it.

## Discussions

### Creating a New Discussion Thread

1. Click the *Discussions* shortcut on the *Quick Launch* bar.
2. Select the discussion board you want to create the discussion in.
3. Click the *New* button and choose *Discussion*.



4. Enter a subject for the discussion in the *Subject* box.
5. Enter and format discussion text in the *Body* box.
6. Click the *OK* button when you are finished.

**Team Discussion: New Item**

OK Cancel

Attach File | Spelling... \* indicates a required field

**Subject \***

**Body**

OK Cancel

## Reading and Replying to a Discussion Thread

1. Click the *Discussions* shortcut on the *Quick Launch* bar.
2. Select the discussion board you want to read.
3. Click the thread name to read the discussion text.
4. Click the *Reply* shortcut.



5. Enter reply text in the *Body* box.
6. Click the *OK* button when you are finished.

The screenshot shows the 'Team Discussion: New Item' form. At the top, there's a yellow header bar with the title. Below it are 'OK' and 'Cancel' buttons. The form has a 'Body' section with a rich text editor toolbar and a text area. Below the text area, there are fields for 'From: Piner, Jarrett', 'Posted: Tuesday, July 22, 2008 8:26 AM', 'Subject: Jarrett's Test Discussion', and 'First Post: HELLO WORLD!'. At the bottom, there are 'OK' and 'Cancel' buttons.

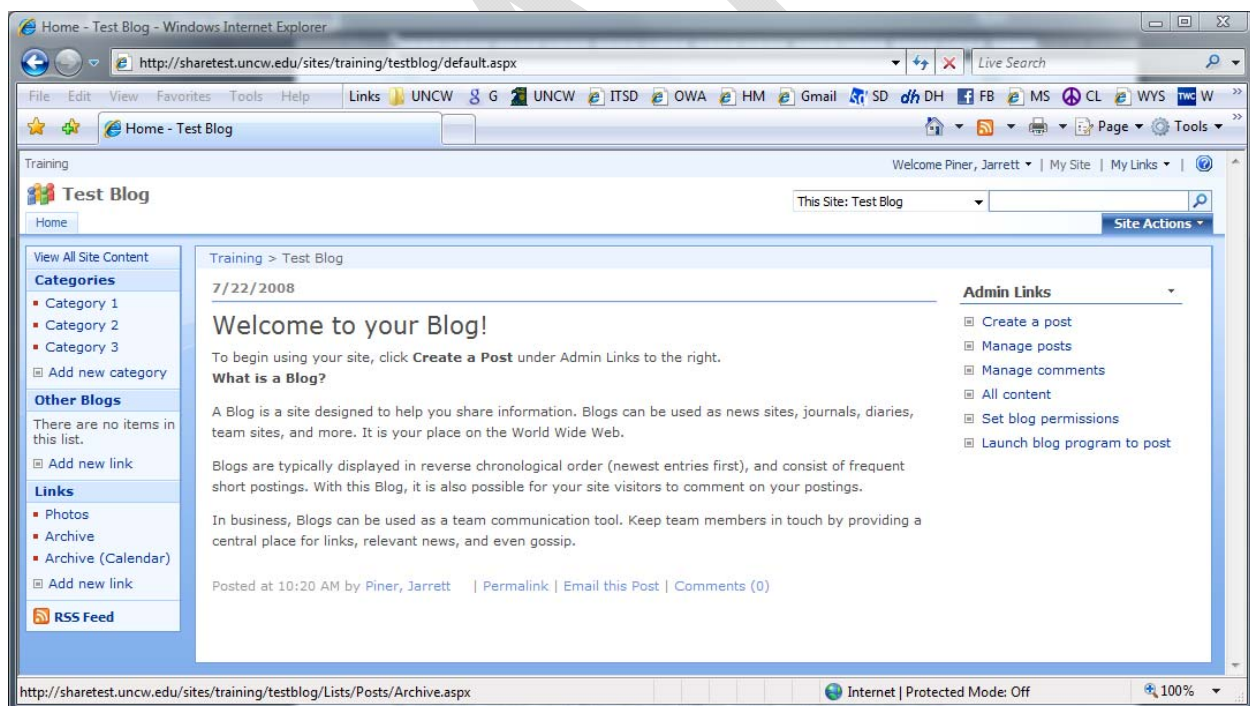
## Using a Blog Site

A blog site is a SharePoint site created by ITSD to provide a place to share information and facilitate team communication.

In order to access your departmental Blog, point your browser to your departmental SharePoint homepage and do the following:

1. Click the *Sites* shortcut on the *Quick Launch* bar.
2. Select the blog site you want to open.

You will see a site similar to the following:



## Creating a Blog Post

1. In an open blog site, click the *Create a post* shortcut in the *Admin Links* section.
2. Enter a title for the post in the *Title* box.
3. *Optional* - Enter post text in the *Body* box.
4. *Optional* - Click the arrow on the *Category* box and select a category from the resulting menu.
5. Enter or select a date and time in the *Published* section.
6. Click the *Publish* button.

### Admin Links

- ☐ [Create a post](#)
- ☐ [Manage posts](#)
- ☐ [Manage comments](#)
- ☐ [All content](#)
- ☐ [Set blog permissions](#)
- ☐ [Launch blog program to post](#)

### Posts: New Item

! Items on this list require content approval. Your submission will not appear in public views until approved by someone with proper rights. [More information on content approval.](#)

Save As Draft

Publish

Cancel

\* indicates a required field

Title \*

Body

Category

(None)

Published \*

7/22/2008

10 AM

23

Save As Draft

Publish

Cancel

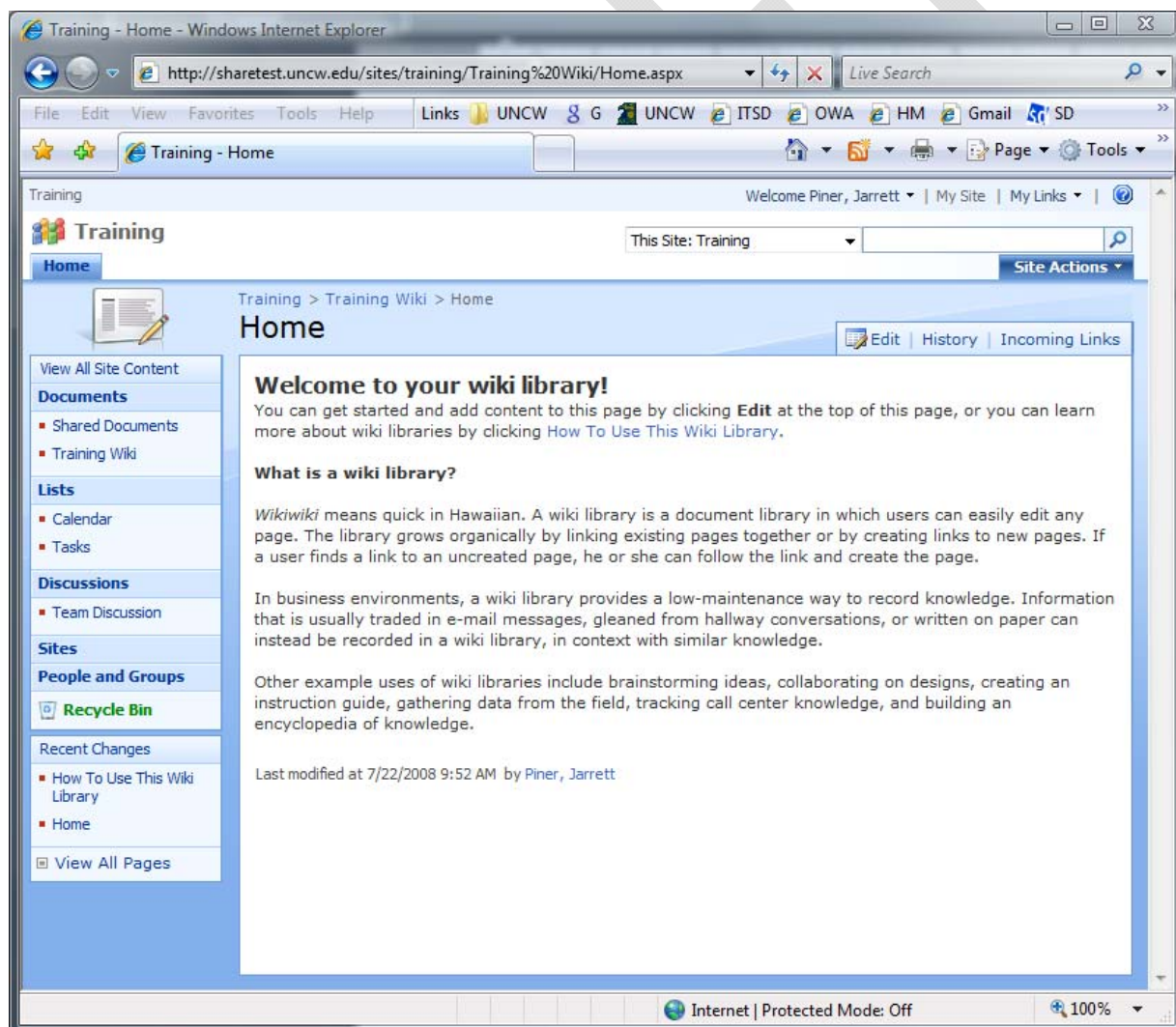
## Using a Wiki Site

A wiki site is a SharePoint site created by ITSD that provides a place for group collaboration and brainstorming ideas.

In order to access your departmental Wiki, point your browser to your departmental SharePoint homepage and do the following:

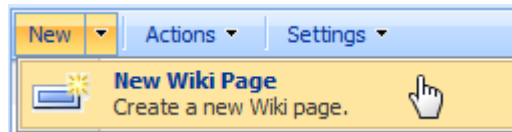
1. Click the *Sites* shortcut on the *Quick Launch* bar.
2. Select the wiki site you want to open.

You will see a site similar to the following:



## Creating a New Wiki Page

1. In an open Wiki site, click the *Wiki Pages* shortcut on the *Quick Launch* bar.
2. Click the *New* button.



3. Enter a name for the page in the *Name* box.
4. Enter text and items in the *Wiki Content* box.
5. Click the *Create* button.

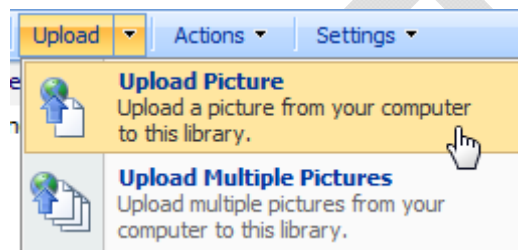
### New Wiki Page

A screenshot of the 'New Wiki Page' form in a SharePoint Wiki site. The form has a yellow header bar with the title 'New Wiki Page'. Below the header, there are two buttons: 'Create' and 'Cancel'. The main form area is divided into two sections. The top section is labeled 'Name' and contains a text box for entering the page name. The bottom section is labeled 'Wiki Content' and contains a rich text editor with various formatting tools (bold, italic, underline, link, etc.) and a large text area for entering the page content. At the bottom of the form, there is a footer with the text 'To link to another wiki page in this library, type [[Page Name]].' and two buttons: 'Create' and 'Cancel'.

## Pictures

### Uploading a Picture to a Library

1. Click the *Pictures* shortcut on the *Quick Launch* bar.
2. Select the library you want to add a picture to.
3. Click the *Upload* button.



4. Click the *Browse* button.
5. Locate and select the picture file you want to add.
6. Click the *Open* button.
7. *Optional* - Check or clear the *Overwrite existing files* box.

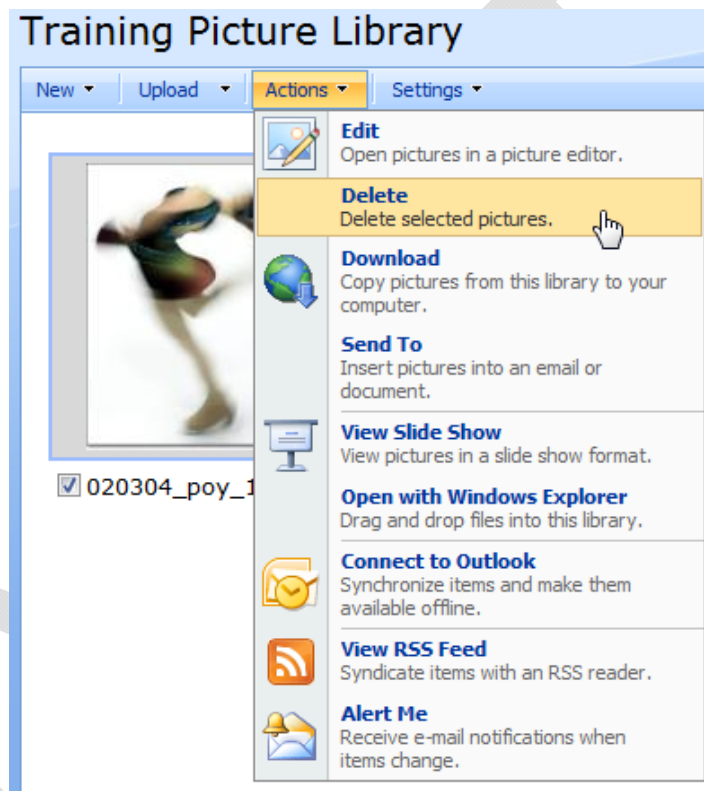
#### Add Picture: Training Picture Library

A screenshot of the 'Add Picture' dialog box in SharePoint. The dialog box has a title bar that says 'Add Picture: Training Picture Library'. Below the title bar, there is a section titled 'Upload Document' with the text 'Browse to the picture you intend to upload.' To the right of this text is a text input field for the file name, followed by a 'Browse...' button. Below the text input field is a link that says 'Upload Multiple Files...'. At the bottom of the dialog box, there is a checkbox labeled 'Overwrite existing files' which is checked. At the very bottom of the dialog box are two buttons: 'OK' and 'Cancel'.

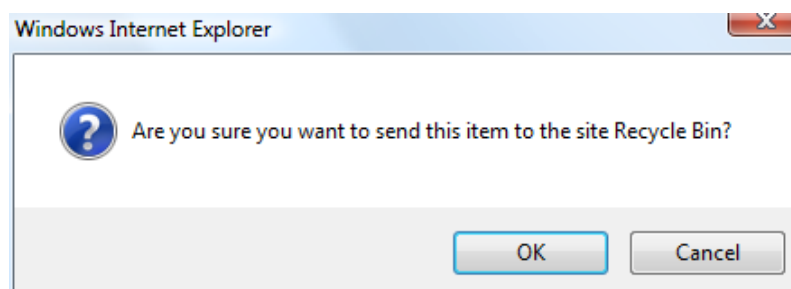
8. Click the *OK* button when you are finished.
9. Enter or change picture properties.
10. Click the *OK* button.

## Deleting a Picture

1. Click the *Pictures* shortcut on the *Quick Launch* bar.
2. Select the library that contains the picture you want to delete.
3. Check the box next to the name of the picture you want to delete.
4. Click the *Actions* button.

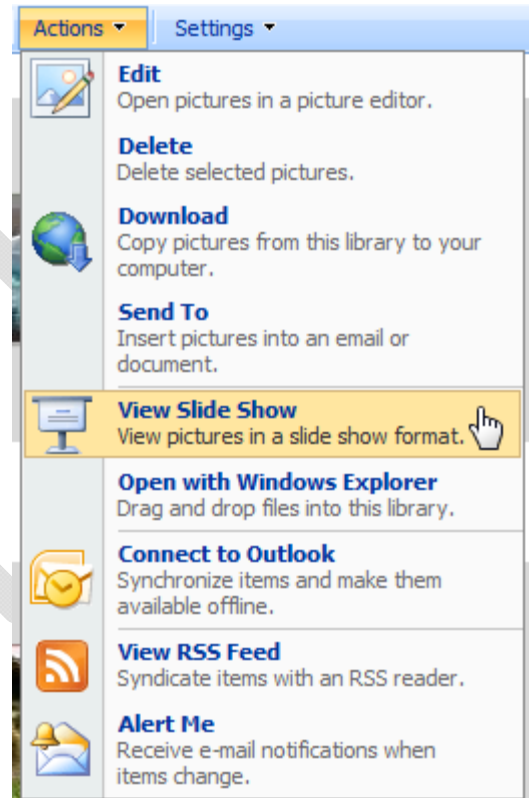


5. Select *Delete* from the resulting menu.
6. Click the *OK* button to confirm deletion.



## Viewing a Slide Show

1. Click the *Pictures* shortcut on the *Quick Launch* bar.
2. Select the library that you want to view a slide show of.
3. Click the *Actions* button.
4. Select *View Slide Show* from the resulting menu.
5. Click the *Play* ( ▶ ) button.
6. *Optional* - To stop the slide show, click the *Stop* button ( ■ ). (Note - the slide show will end automatically after all the pictures have been displayed).
7. When the slide show is finished, click the *Close* button to close the *Slide Show* window.

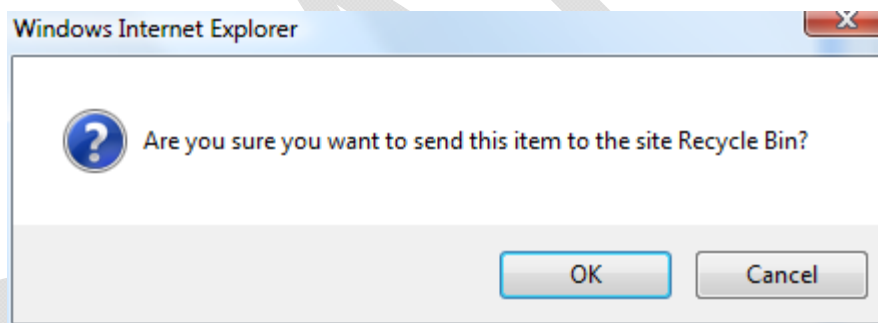
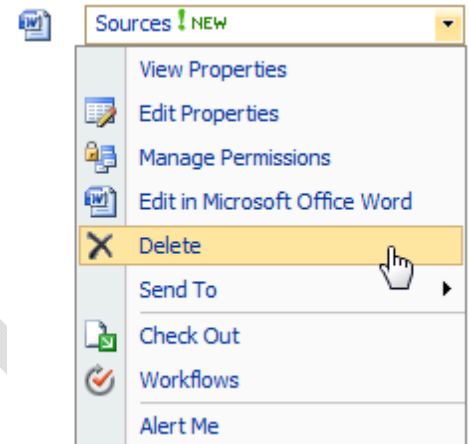


*Note* - To scroll through the picture in a library at your own place, click the *Previous* ( ◀ ) and *Next* ( ▶ ) buttons.

## Using the Recycle Bin

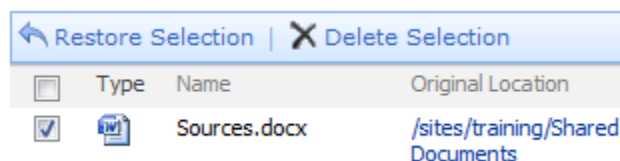
### Deleting an Item

1. Place your mouse pointer over the item you want to delete.
2. Click the *Edit* arrow.
3. Select *Delete* or *Delete Item* from the resulting menu.
4. Click the *OK* button to confirm deletion.



### Restoring a Deleted Item

1. Click the *Recycle Bin* shortcut on the *Quick Launch* bar.
2. Check the box next to the item you want to restore.
3. Click the *Restore Selection* shortcut.
4. Click the *OK* button to confirm that you want to restore the item.



## Viewing User Information

1. Click the *People and Groups* shortcut on the *Quick Launch* bar.
2. Do one of the following:
  - a. To view users for a specific group - click the group name in the *Groups* section of the *Quick Launch* bar.
  - b. To view all users - click the *All People* shortcut on the *Quick Launch* bar.
3. Click the name of the user you want to view information for (*Note* - The users *My Profile* page will be displayed).



## Getting Help

1. Click the *Help* button in the upper-right corner of the window (*Note* - the *SharePoint Server 2007 Help and How-to* window will appear).
2. In the *Contents* box, click a topic to view its subtopics.
3. Click a subtopic to display help information.
4. Click the *Close* button when you are finished.

## Questions or Problems?

Contact the Technology Assistance Center (TAC)

Location: Hoggard Hall, room 126

Phone: 962-HELP (4357)

E-mail: [tac@uncw.edu](mailto:tac@uncw.edu)

Web Address: [www.uncw.edu/tac](http://www.uncw.edu/tac)