SharePoint Training

Administrative Group Summit

U.S. DEPARTMENT OF ENERGY | Legacy Management
KNOWLEDGE CENTER

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Why SharePoint

- Version control
  - Each library can be set to keep prior versions of a file. Files with the same name will overwrite each other to ensure the most recent one is available.
  - By eliminating the practice of emailing files, you can be sure that the single version on SharePoint is the most current version without guessing.
  - Eliminate rework and save time.
- Accountability
  - Each save records who the file was last modified by.
  - Comments can be used to alert coworkers of changes and pertinent information.
- Security
  - Security groups can be created to meet group needs.
  - Each document library, calendar, and discussion group can be made accessible accessible only to the members in the allowed groups, at the allowed level.
  - Permissions can be customized down to the file level, if needed.
- Centralized communication
  - Using discussion boards instead of email for information that needs to be dispersed to an entire team ensures that it doesn't get lost in an inbox.
  - Information remains easily accessible to all team members.

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Browser Requirements

- Internet Explorer (IE)
  - IE is the only browser fully compatible with SharePoint.
  - Firefox and Chrome are incompatible. While they will allow you to view some areas seamlessly, they cannot complete all the functions available or utilized by SharePoint sites.

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Terminology

- Alert
  - A notification to users that there are changes to existing information or new information in a specified location. Alerts can be set on individual files, lists, libraries, and pages.
- Discussion board
  - A central location t share information under multiple topics.
- Document library
  - A list where documents and folders are stored. The document library settings control versioning settings, workflow settings, and information policies.
- List
  - A list is a collection of information items displayed in an area or on a site. List types include: Announcements, Links, Contacts, Events, Tasks, and Issues.
- Page
  - A user-created area on a SharePoint site for displaying content.
- Public-facing site
  - A SharePoint site that is accessible by all LM and LMS employees.
- Security group
  - A collection of defined users that can be granted permission to documents, libraries, lists, and sites as a group.

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Terminology

- Site
  - A complete SharePoint site stored in a named portion of the top-level site.
- Subsite
  - A named subdirectory of the top-level site that is a complete site. Each subsite can have independent administration, authoring, and browsing permissions from the top-level sites and other subsites.
- Team site
  - A SharePoint site accessible only by the team members defined in security or domain groups.
- View
  - A named collection of settings for querying and displaying items or documents in a SharePoint list or library. There are two types of views: Personal, which can be used only by the user who creates them; and Public, which can be used by all users who have access to the site.
- Web part
  - Customizable page element that can be added to SharePoint pages.
- Workflow
  - The automation of processes, where documents and tasks are passed automatically from one user to another for action, according to a set sequence.

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LISTS AND LIBRARIES

Lists and Libraries

Lists

- Made up of line items
- Can hold attachments
- Created by adding information lines

Libraries

- Made up of files including documents, spreadsheets, slide presentations, images, and more
- Created by uploading or creating a file

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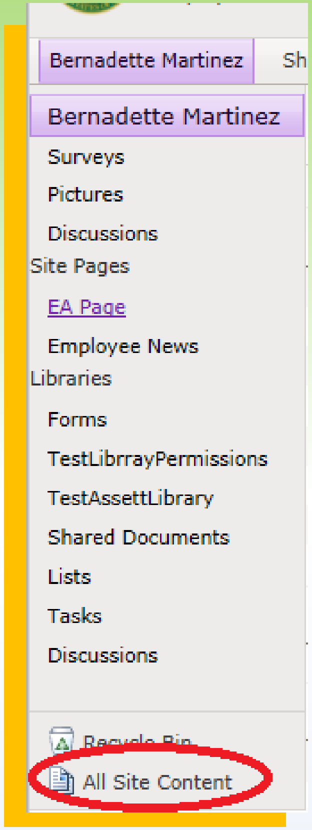
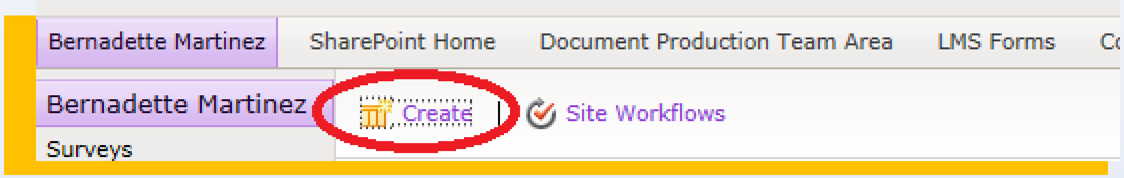
Creating a List or Library

To create a new list or library:

- Go to **All Site Content**, located on the bottom of the left-hand navigation menu on any page.
- Click **Create** at the top of the page.





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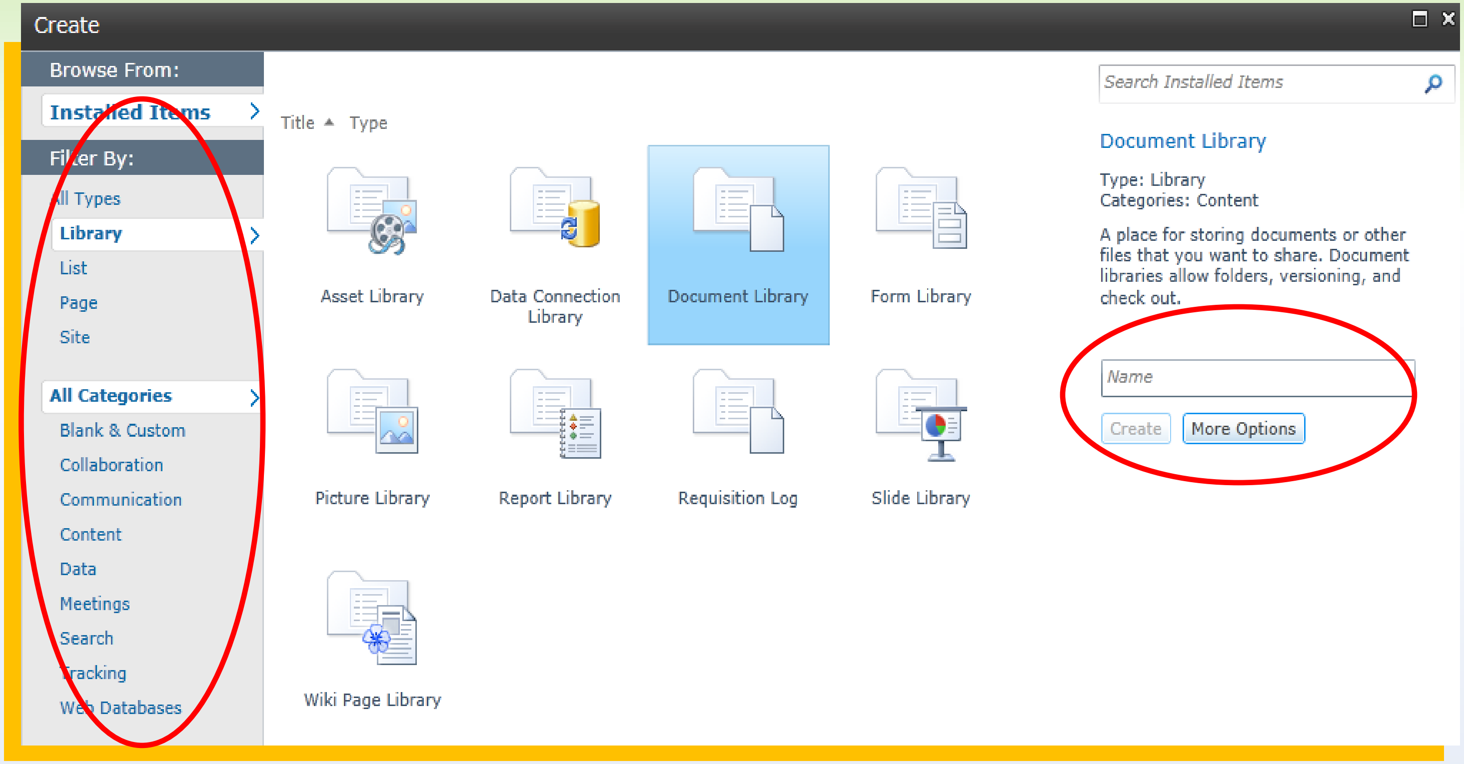
Creating a List or Library

- Select the thing you want to create. Use the filters on the left to display fewer options.
- Give the list or library a name and click **Create**.
- **More Options** will give you the choice to add a link to the left-hand navigation menu.



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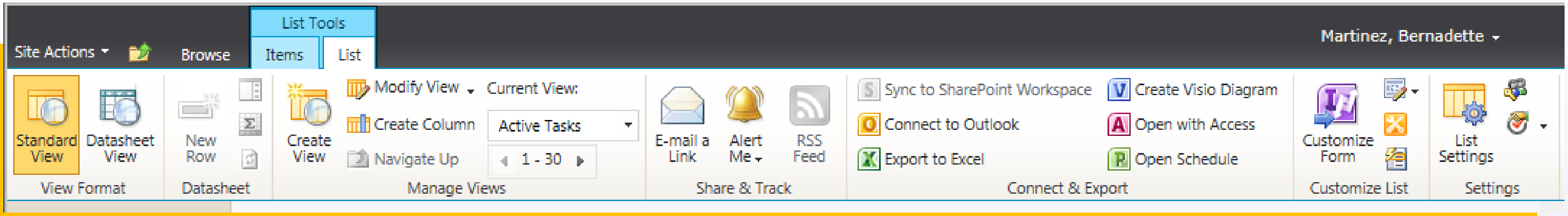
Adding Columns

You can add existing site columns or create custom columns for any list or library.

To add columns, navigate to the list or library and go to **List (Library Tools > List (Library) > List (Library) Settings**.



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Adding Columns

Under **Columns** select **Add from existing site columns** or **Create column** based on your needs.

Columns

A column stores information about each document in the document library. Because this document library allows multiple content types, some column settings, such as whether information is required or optional for a column, are now specified by the content type of the document. The following columns are currently available in this document library:

Column (click to edit)	Type	Used in
Author	Single line of text	New Folder Custom
Test	Choice	Document
Test 1	Yes/No	New Folder Custom
Title	Single line of text	Document, New Folder Custom
Created By	Person or Group	
Modified By	Person or Group	
Checked Out To	Person or Group	

Create column

Add from existing site columns

Indexed columns

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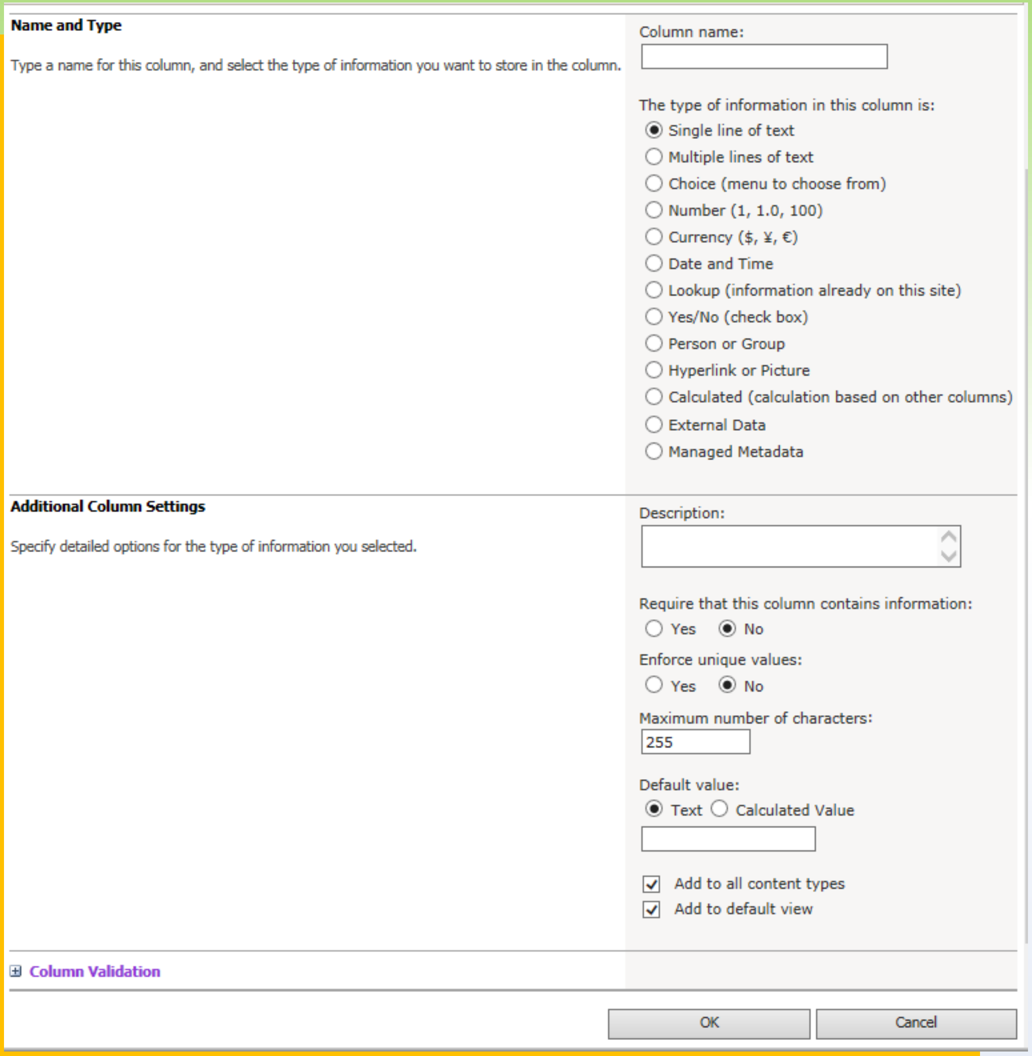
Adding Columns

If choosing to create a column, select the options for the column.

After making the column selections, click **OK**.



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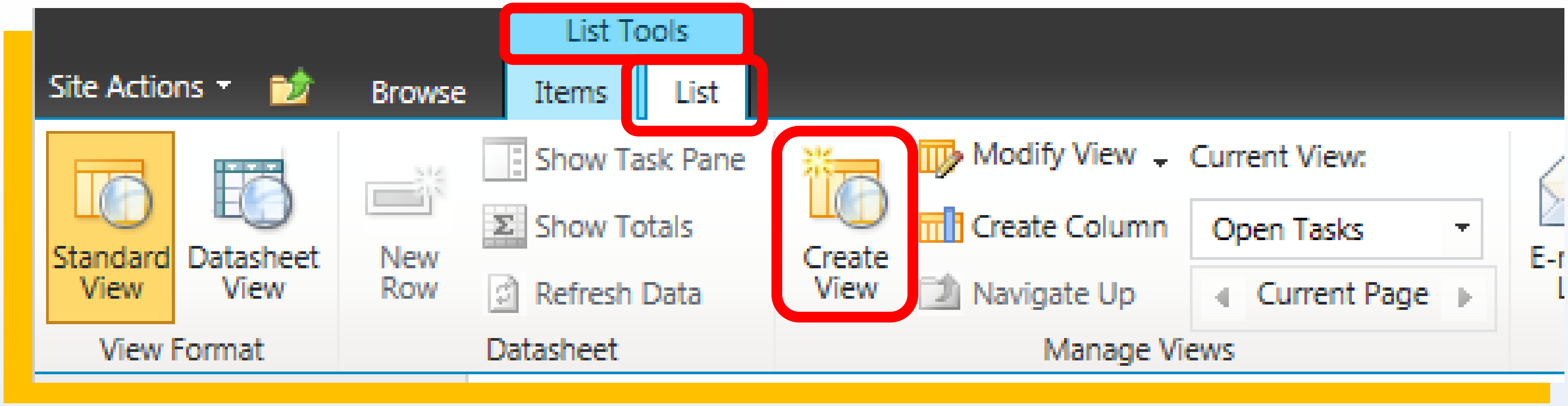
Creating Views

Multiple views can be created for any list or library by going to **List (Library) Tools > List (Library) > Create View**.



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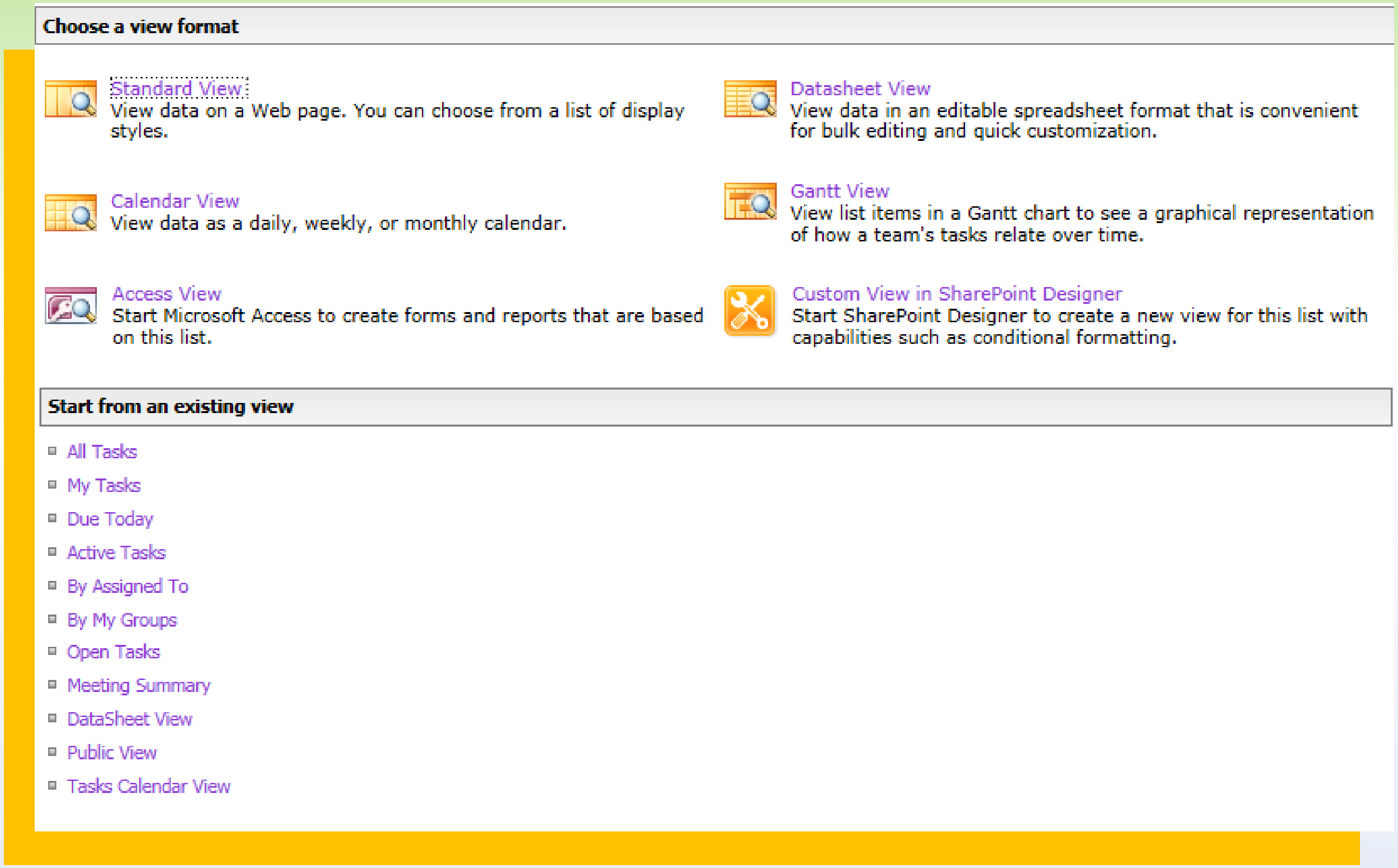
Creating Views

Select one of the formats to begin from scratch or select an existing view to modify it to create a new one.



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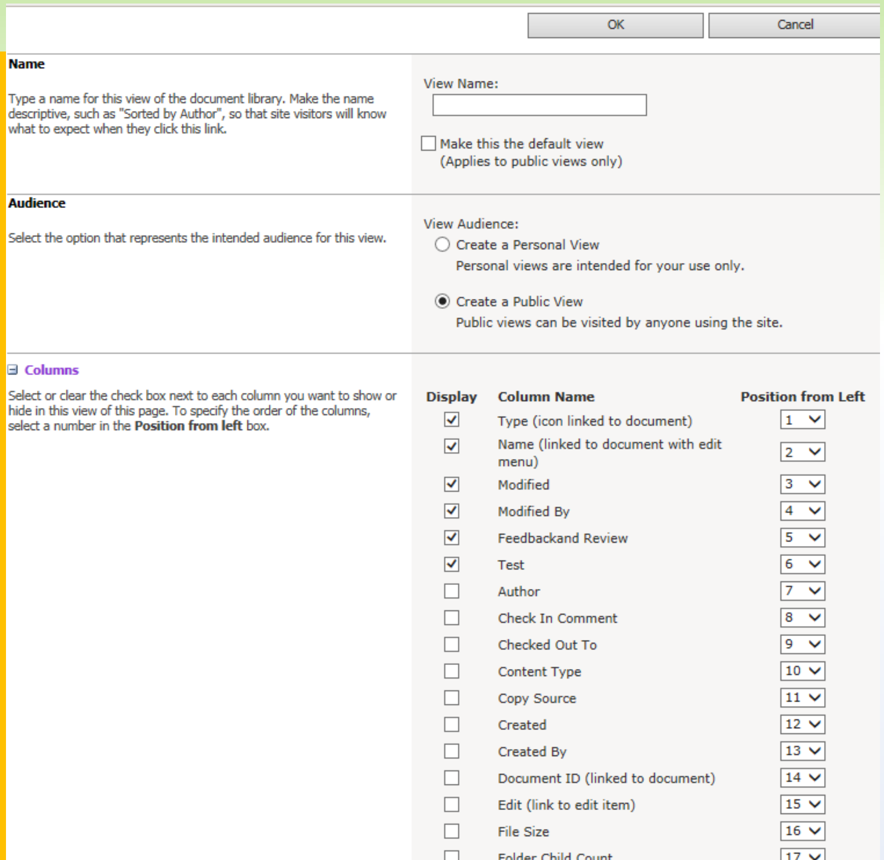
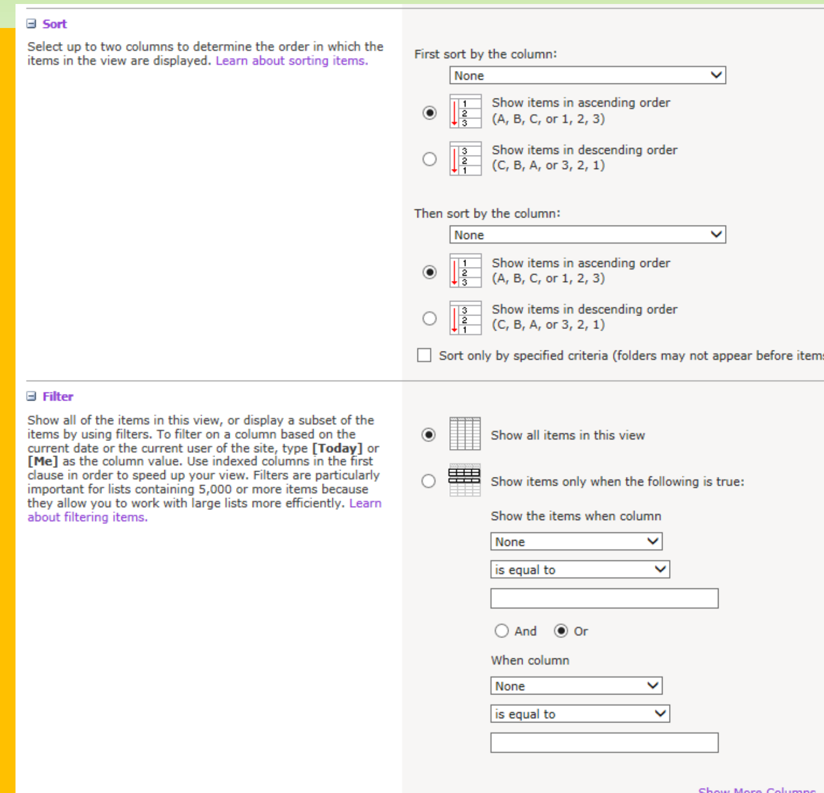
Creating Views

Name the view, select the audience (public or personal), the columns to display, and sorting and grouping options.





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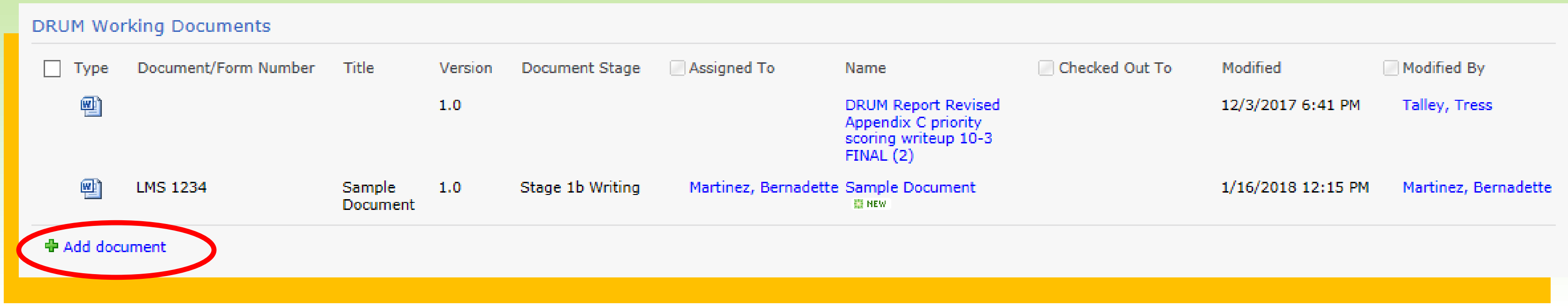
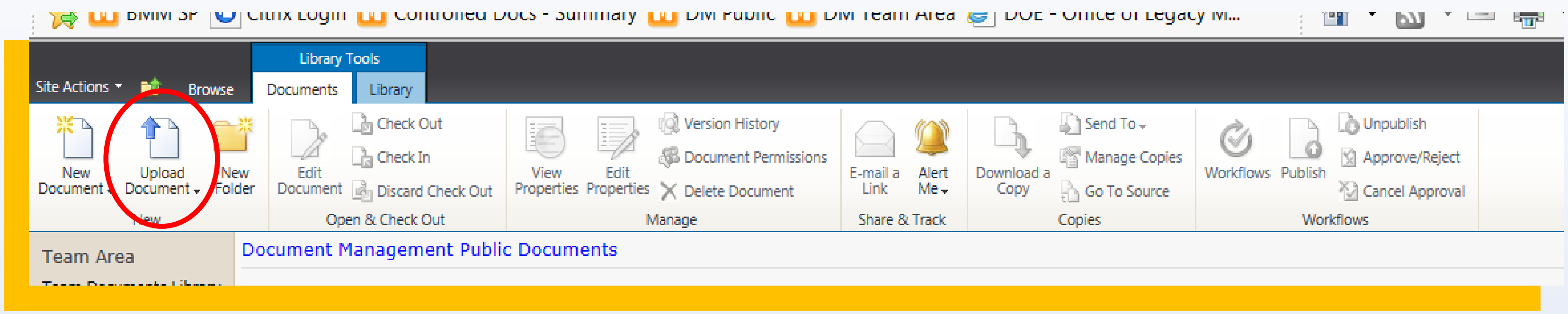
UPLOADING FILES

Uploading Files

To upload a new file, navigate to your desired library and click **Add document** in the lower left of the library.



You can also go to the ribbon and click **Upload document**.



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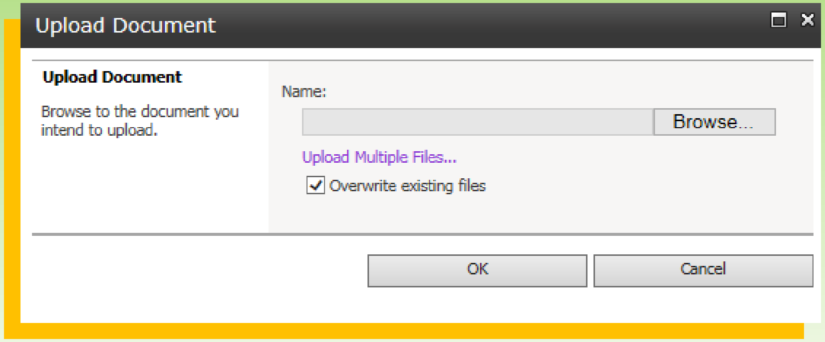
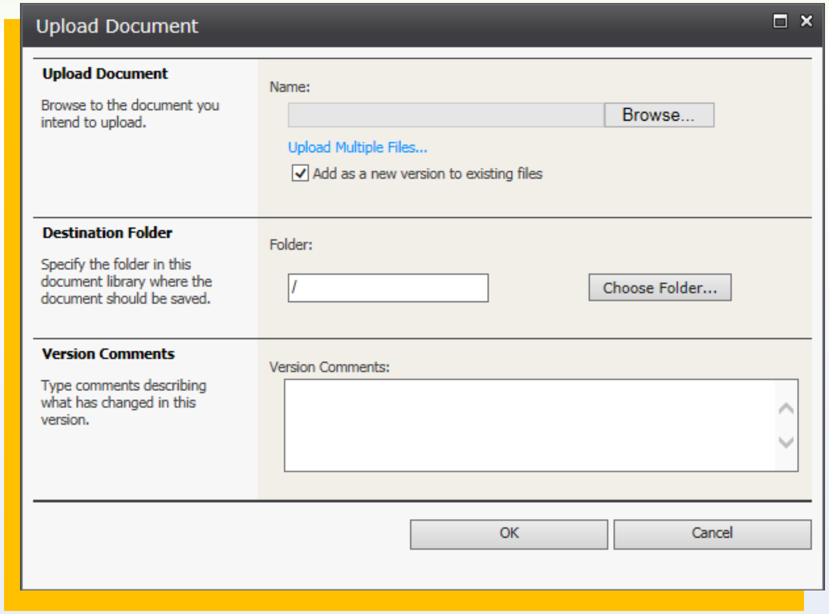
Uploading Files

- Click **Browse** to locate a single file for upload.
- Select the folder, if necessary, by clicking **Choose Folder…**(this will populate automatically if you are in a folder already).

Note: SharePoint's filtering and view options make folders unnecessary in many cases.

- Network folder file names are limited to 250 characters including the entire file path, so names should be concise and abbreviated where possible.
- Click **OK** to upload the file.





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Uploading Files

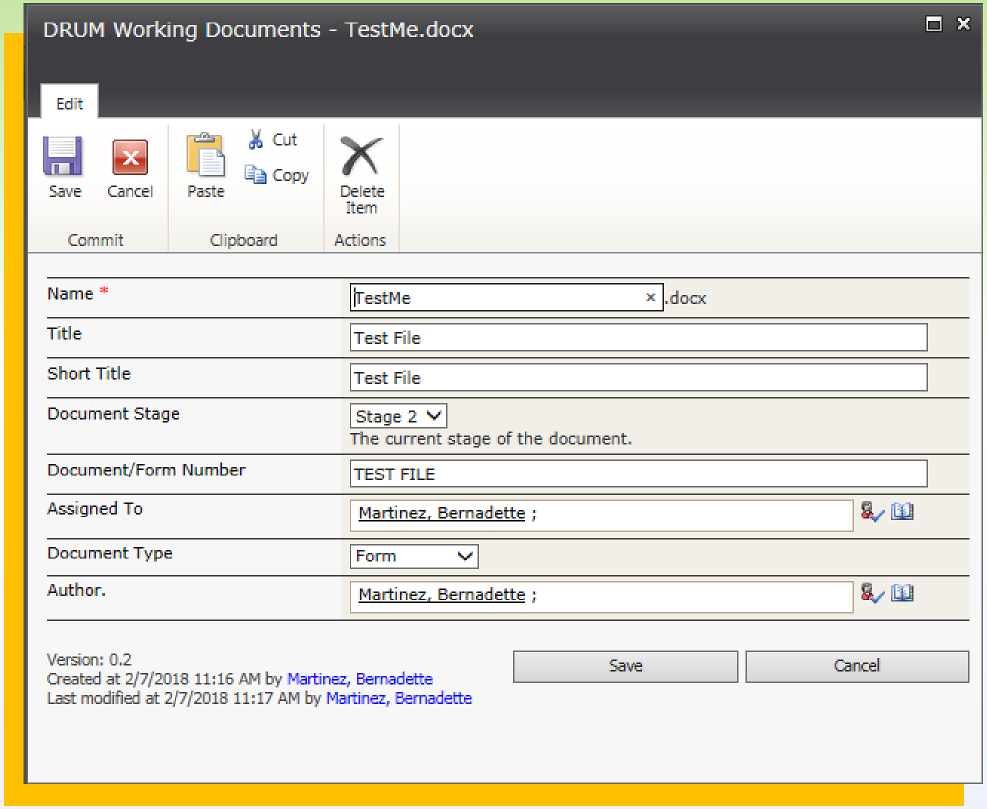
When your file has uploaded, the document properties window will appear.

The **Name** field is the file name of the uploaded file.

If there is metadata in the file, it will populate the **Title** field.

Enter any other information that has been set up in the appropriate areas and click **OK**.

Your screen will reload and you will see the file in the library.



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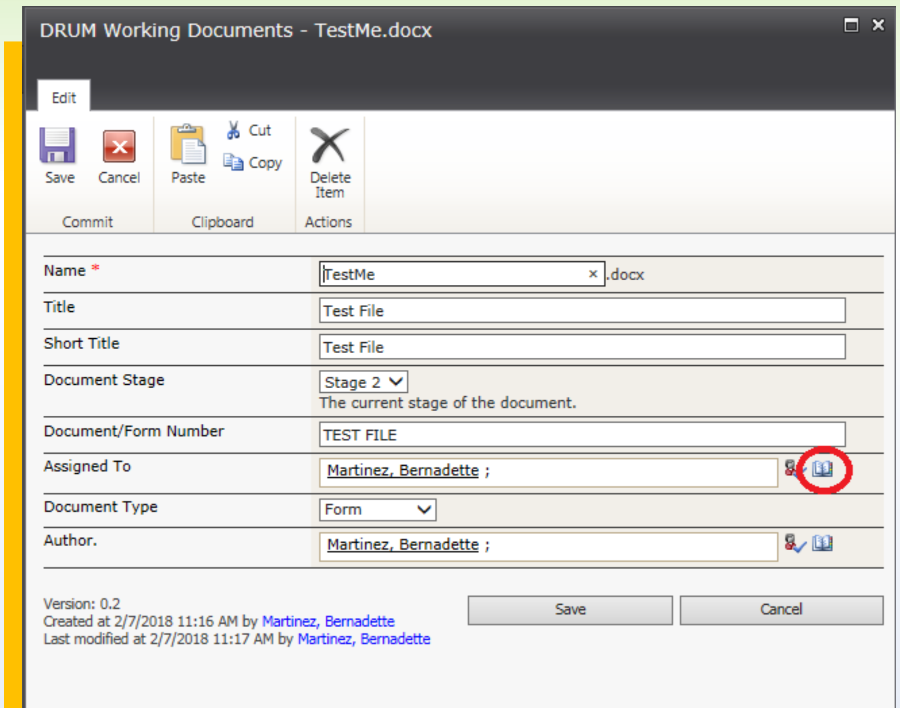
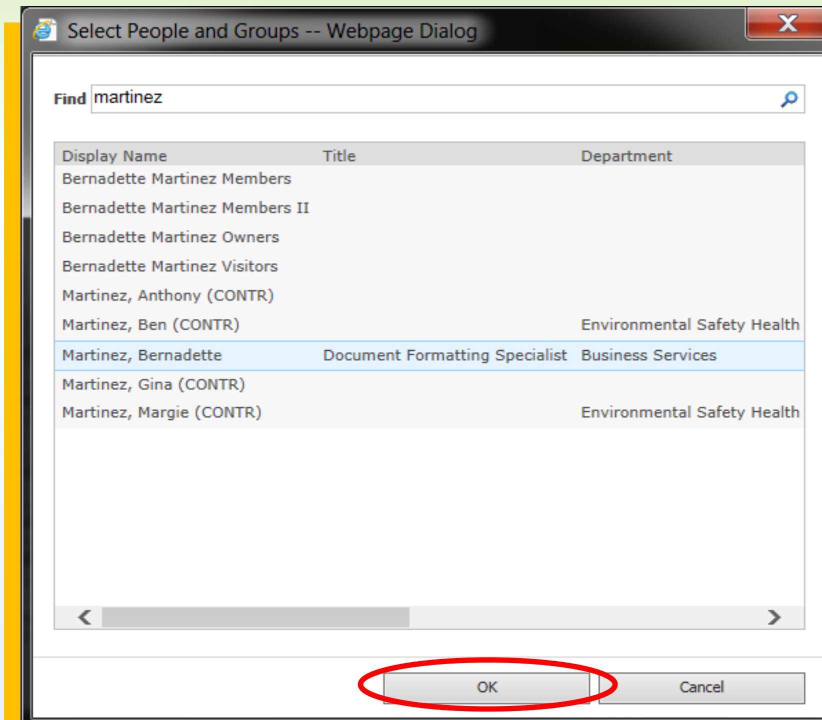
Uploading Files

Note:

Some fields, like the **Assigned To** field, can be created as lookup fields. Type the name as last name, first name and hit enter. If there are any spelling errors, it will not save. Click the book icon to search for names. Select the appropriate name from the list and click **OK**.





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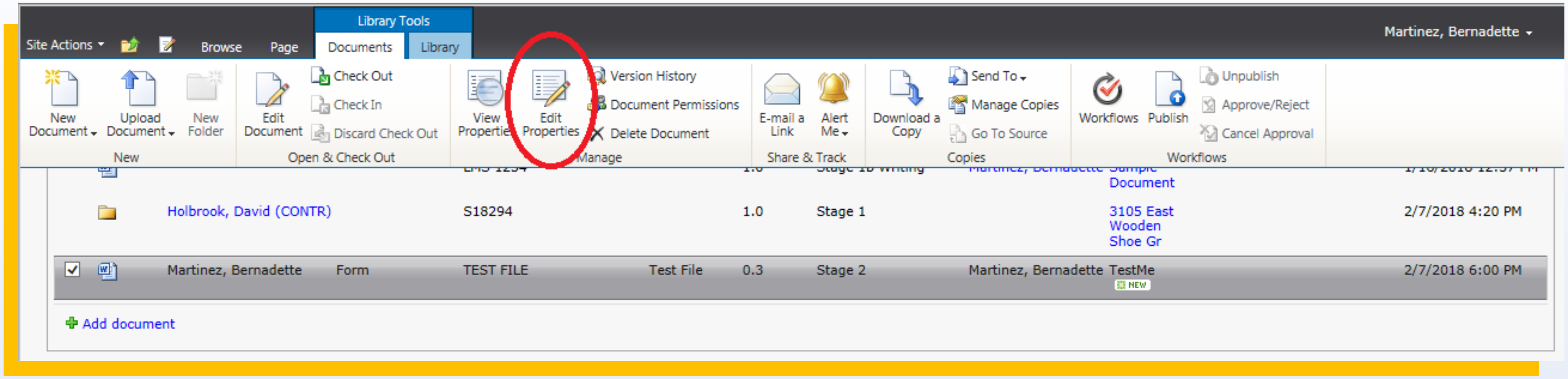
UPDATING LIST / LIBRARY COLUMNS

Updating List/Library Columns

When you update the properties of a document or folder, you will be prompted to check out the item. There are two methods to do so.

Method 1

- Check the box in front of the document.
- Click **Edit Properties** on the the **Library Tools > Documents** ribbon.



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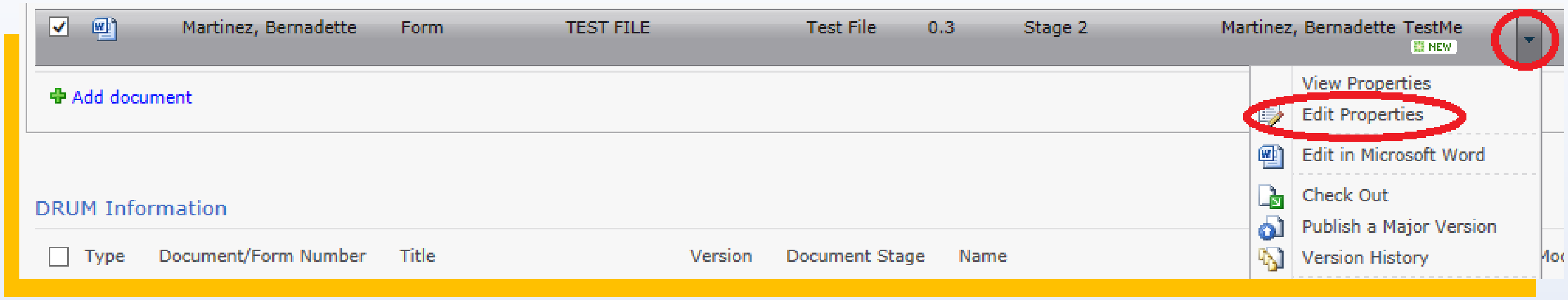
Updating List/Library Columns

When you update the properties of a document or folder, you will be prompted to check out the item. There are two methods to do so.

Method 2

- Click the dropdown arrow next to the file name.
- Click **Edit Properties** in the drop down menu.



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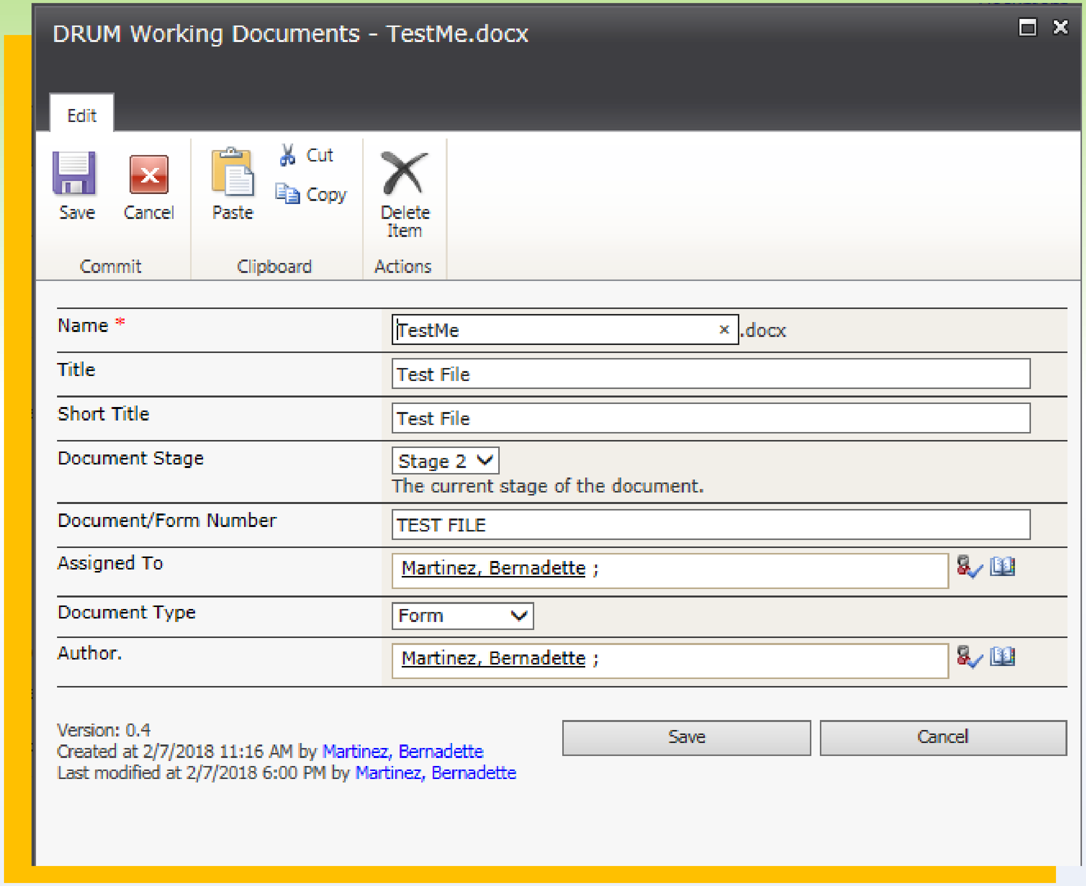
Updating List/Library Columns

From this screen you can update all the properties of the document. Make the necessary updates and click **Save**.

This does not check in the file. Until the file is checked in, updates will not be visible to anyone else.



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UPDATING FILES

Updating Files

- You **must** use the Internet Explorer browser to utilize SharePoint pages. Firefox and Chrome are not compatible with SharePoint functions. If you encounter anything strange, especially forced downloads of files when you attempt to open them, check your browser first.
- SharePoint will time out after 30 minutes of inactivity. Best practice is to save your work often, just as you would with offline files. If you have a document open and need to leave your desk for any reason, save the file first. This will ensure all your work is saved and none of your changes are lost.
- If SharePoint is being used to maintain version control, all documents should be worked on SharePoint exclusively. In this case, do not download documents from SharePoint to work on them. All files must be opened, worked on, and saved in SharePoint, not on your hard drive. In order to maintain version control, it is imperative that only one copy of the file be used.

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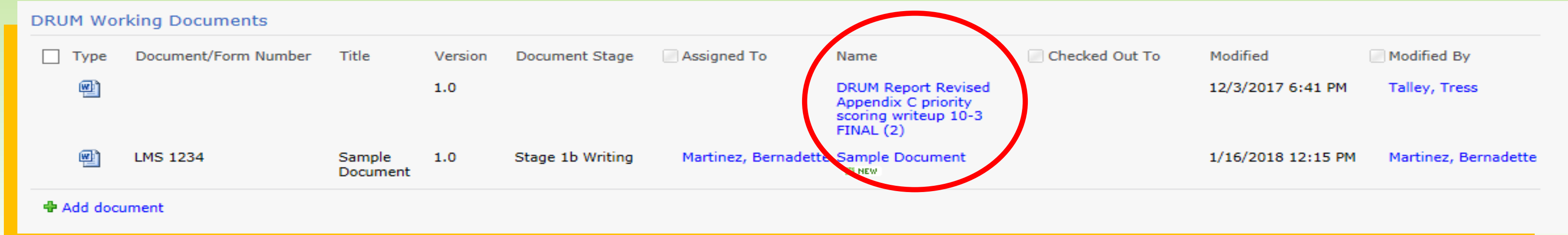
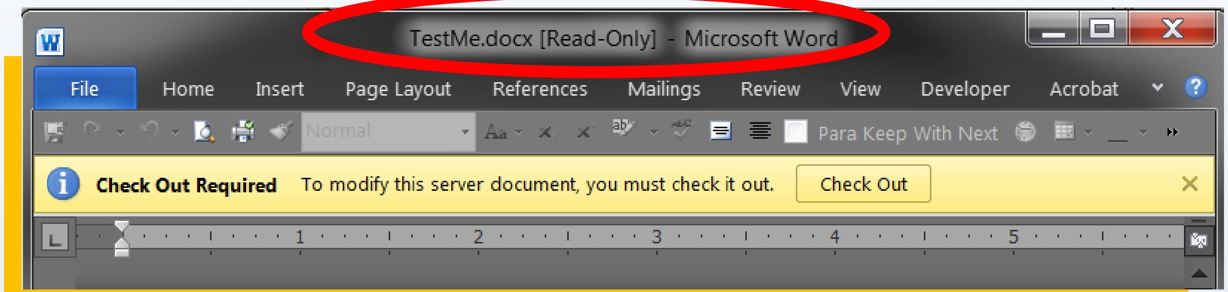
Opening Files

To open a file, click on the file name in the library you are working in (shared documents, team information, etc.). File names will always display as blue hyperlinks. The file will open in the appropriate Microsoft Office program.



Click the file name **only once**. *Be patient*. If multiple copies open, you may inadvertently start working on a read-only copy and you will not be able to save your work. If multiple copies open, ensure the one you ultimately work on does not have **[Read-Only]** in the heading. If it does, close it and reopen the file from SharePoint.



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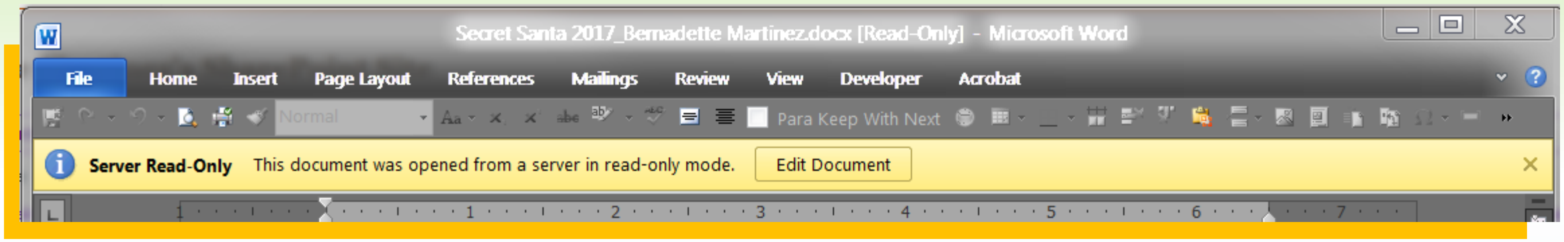
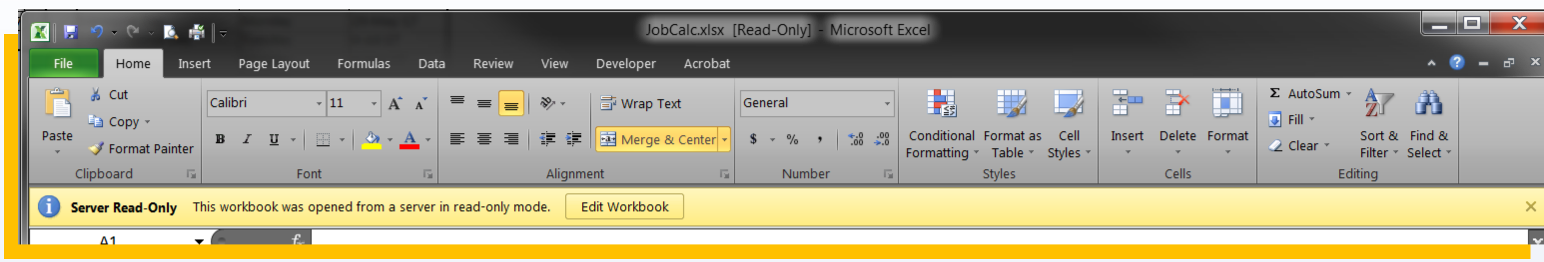
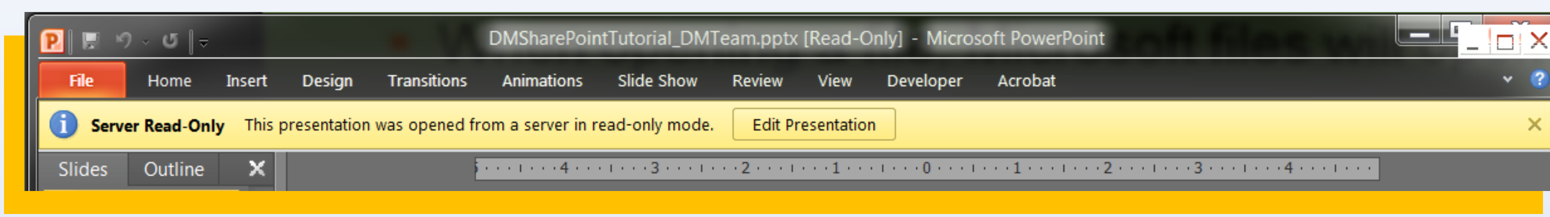
Editing Files

- When opening a file, Microsoft files will open in read-only mode.
- Click **Edit Document** in the yellow information ribbon across the top of the file.
- The file will reload and you will be able to edit it normally.







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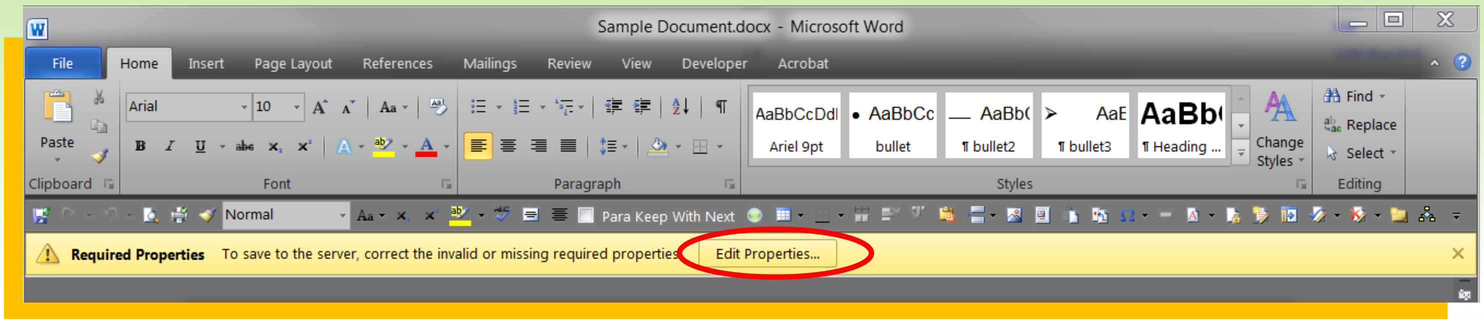
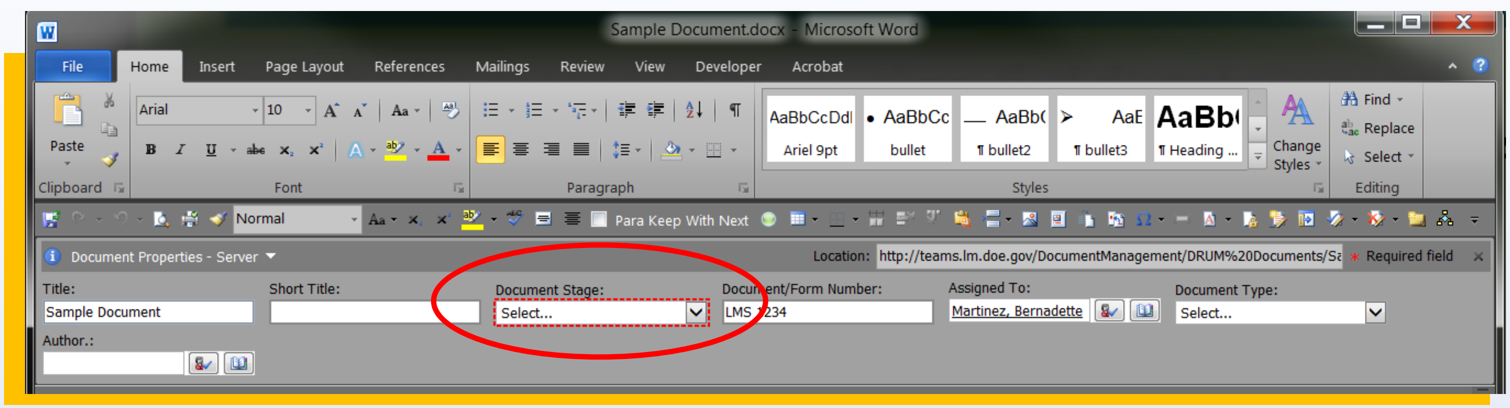
Updating File Properties in Word

If the file properties have values that do not correspond to the current options in SharePoint (for example, if choices were updated), you will see a yellow ribbon prompting for changes. Click **Edit Properties** to display the properties panel in the document.



The values that require updating will highlight themselves in a broken red outline. Select from the provided options or update the information in the necessary manner to update the file.



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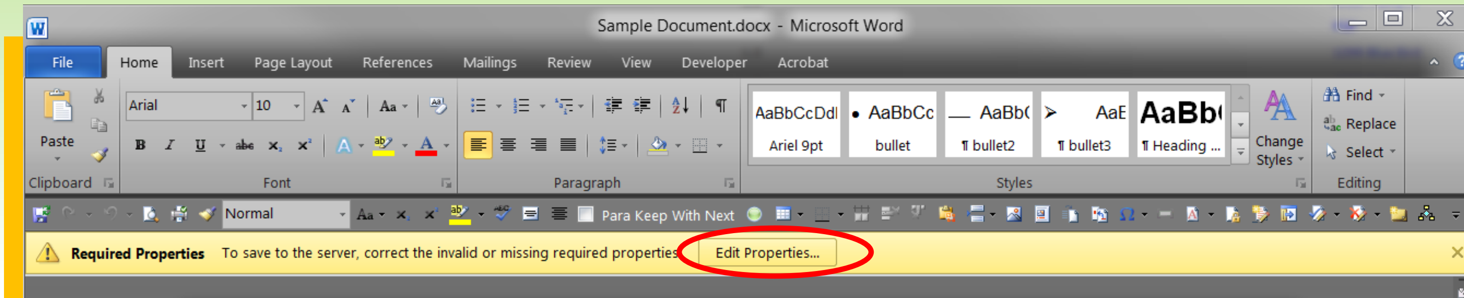
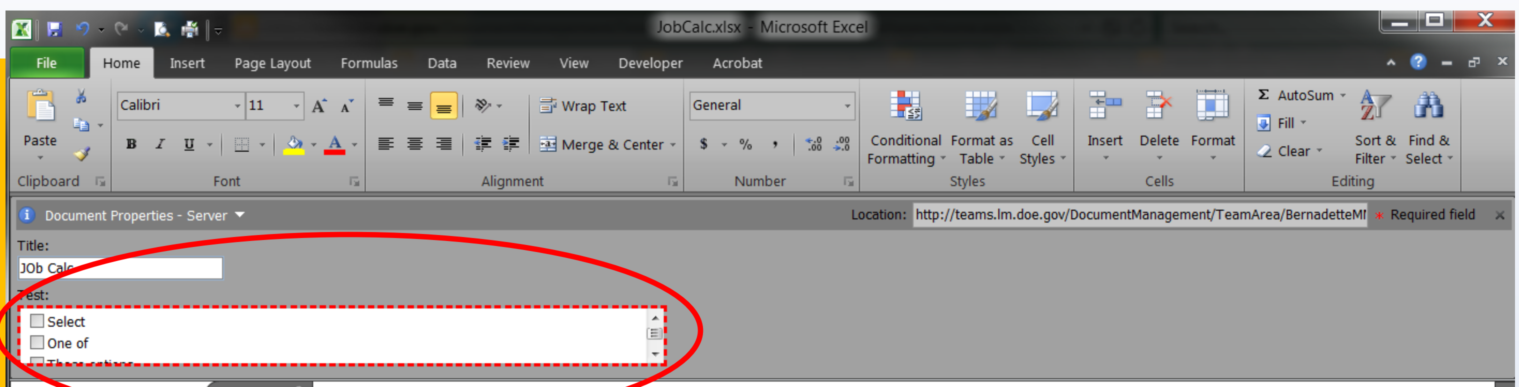
Updating File Properties in Excel

If the file properties have values that do not correspond to the current options in SharePoint (for example, if choices were updated), you will see a yellow ribbon prompting for changes. Click **Edit Properties** to display the properties panel in the document.



The values that require updating will highlight themselves in a broken red outline. Select from the provided options or update the information in the necessary manner to update the file.



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Updating Files

- Once you open a file for editing, you can make changes to it as you normally would. There are no differences between updating the content of a SharePoint file and an offline file.
- Track Changes and SharePoint
  - If Track Changes are on, as is standard with our files, you will not see other users' updates in real time. You will still see notifications on the bottom of your screen indicating that there is new information available.
- Some file types, such as Excel, cannot be opened in the web view if certain features are enabled.

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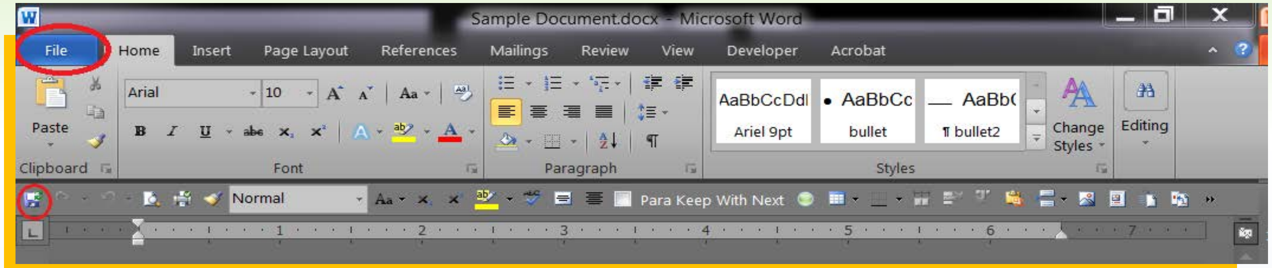
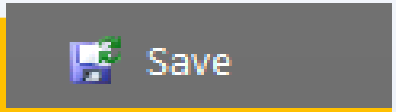
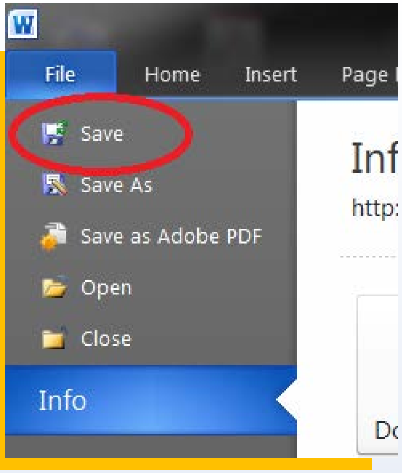
Saving Files

Update the file as needed in SharePoint. When you are ready to save, click the **save icon,** use **Crtl + S** on the keyboard, or go to the file menu and click **Save**. The file will be updated on SharePoint and anyone who opens it will see the most recent versions of the file.



Server copies of the file will always have a green arrow around the save icon. Always save to the server.





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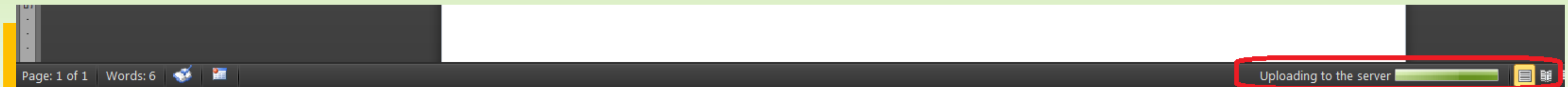
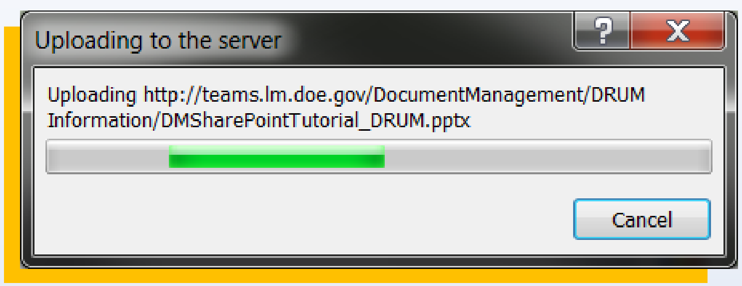
Saving Files

When you save a Microsoft file, you will see a status bar in the lower right corner of the document. It is easy to miss if you aren't looking for it.

PDF files do not have this status bar. If it was opened from SharePoint, it will save to the server.



When working with larger files or at times when the server is slow, a popup window will appear indicating the file is updating. *Be patient* and wait for it to complete. Some files become very large when many images are added. The traffic on the network, the file size, and the power of our machines all impact the time it takes to save files. The file will upload and save to the library as intended.



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Co-Authoring

SharePoint offers a feature called co-authoring. This allows multiple users to work on the same file simultaneously.

Pros

- Faster
- Real-time updates
- Collaborative work environment

Cons

- No real-time updates if using Track Changes
- Refreshing to see changes

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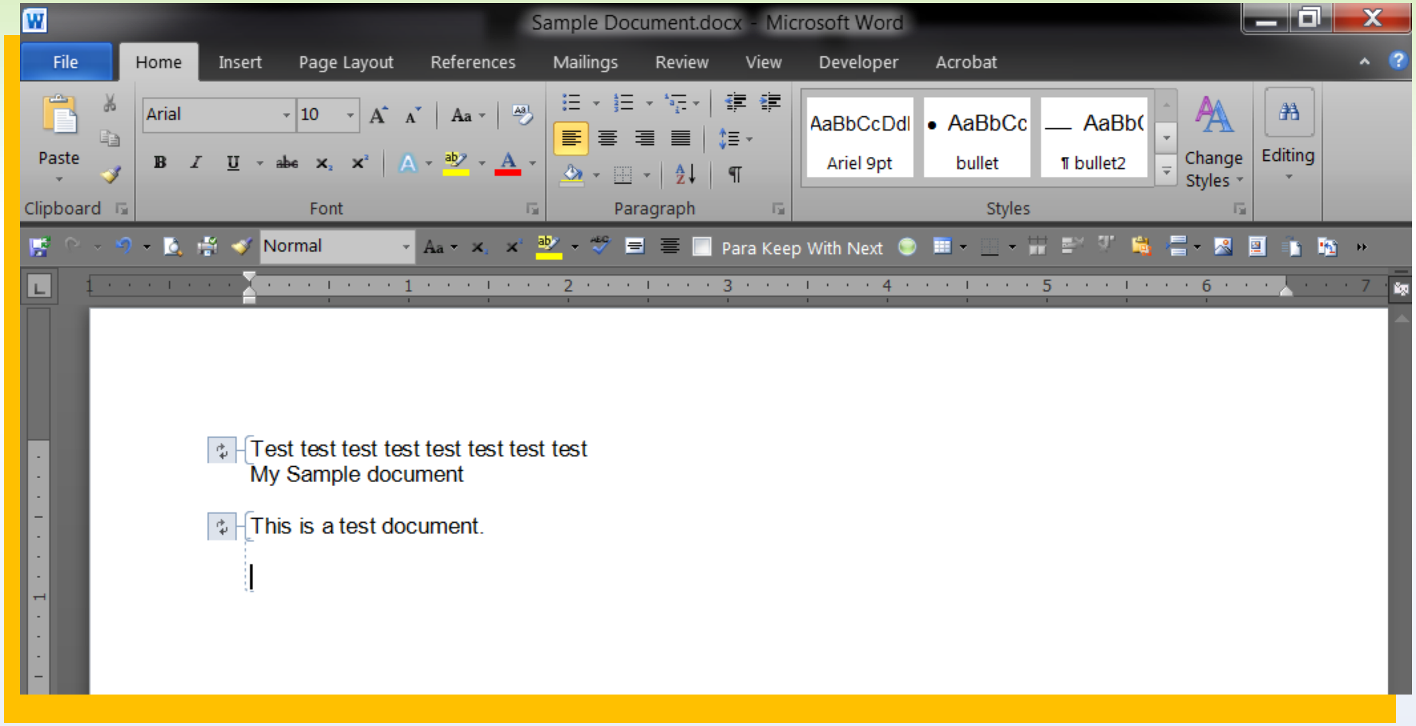
Co-Authoring

If there are changes made to the file by another user, you will be alerted. The updated areas will be bracketed and refresh arrows will be around the updated text, indicating a refresh is needed.



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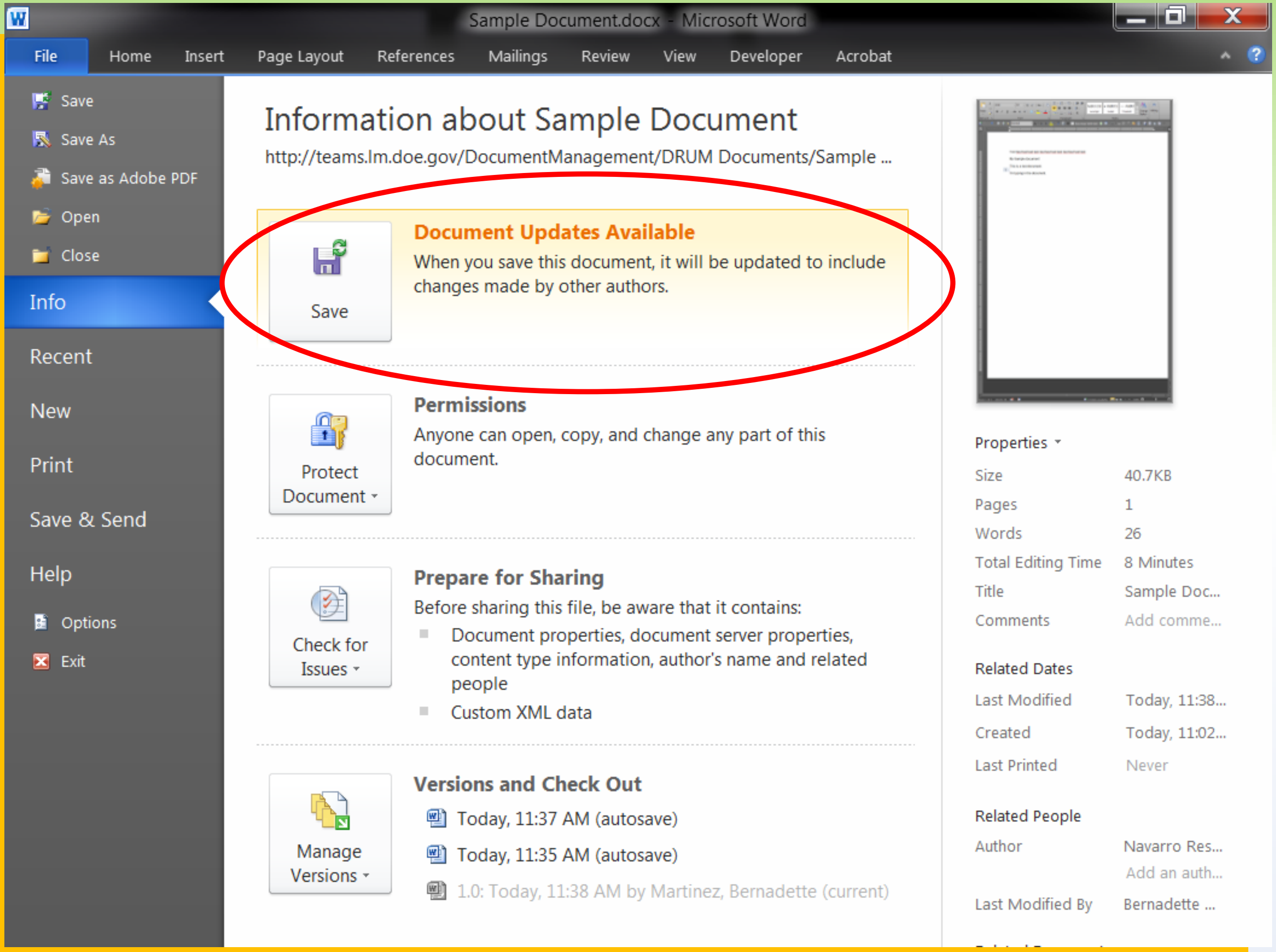
Co-Authoring

If you use the file menu to save, you will see a notification of updates in the file menu as well.



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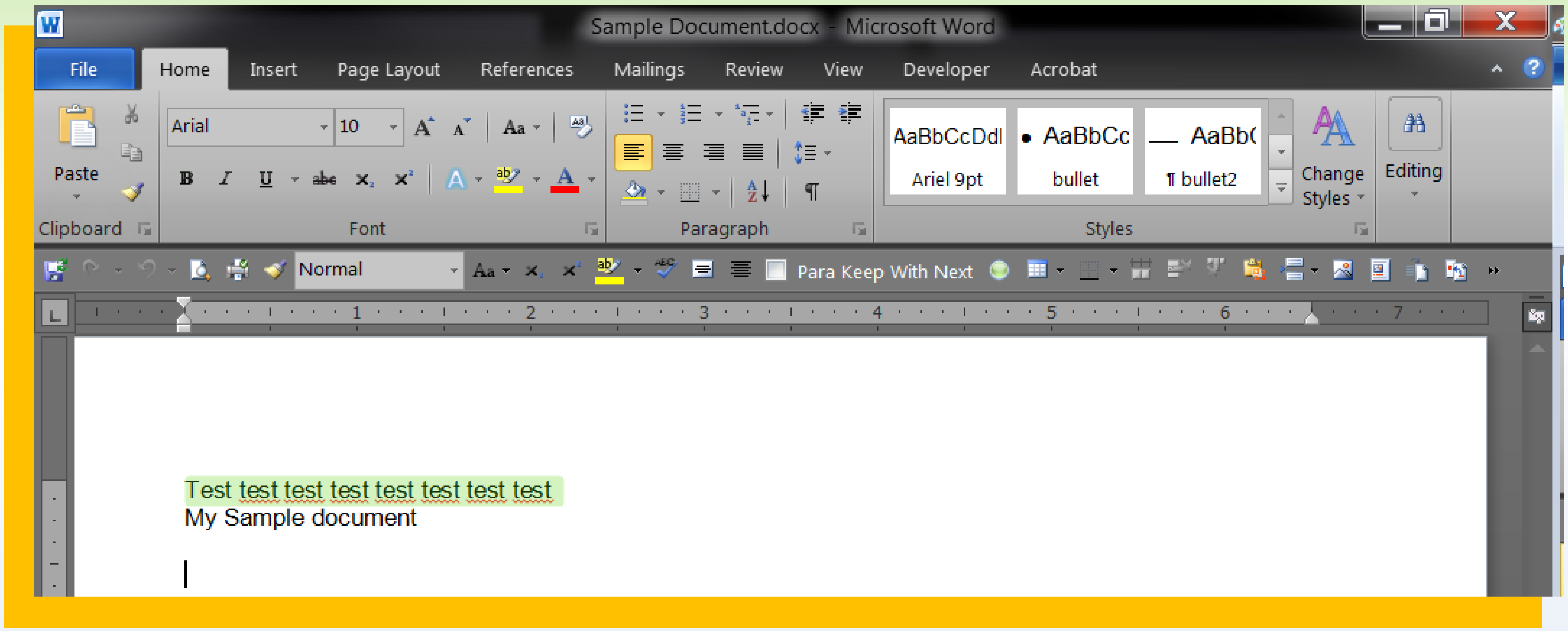
Co-Authoring

After you save to refresh the file, the updated areas will be highlighted for you to review.



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Checking Out Files

If it is *absolutely necessary* to be the only person with access to a file, you can check out a file for editing. This should only be done when files are in the formatting and editing stage or a situation requires it. Otherwise, this should be avoided.

When a file is checked out, other group members cannot make updates or see updates until it is checked in by the person working on it. If that person is out or for any reason doesn't have access to SharePoint and the file is needed, it can be force checked in, but **all changes made will be lost**. There is no way to retrieve this information.

Unless the version cannot change (as in the formatting and editing stage), there are very few practical reasons for files to be checked out.

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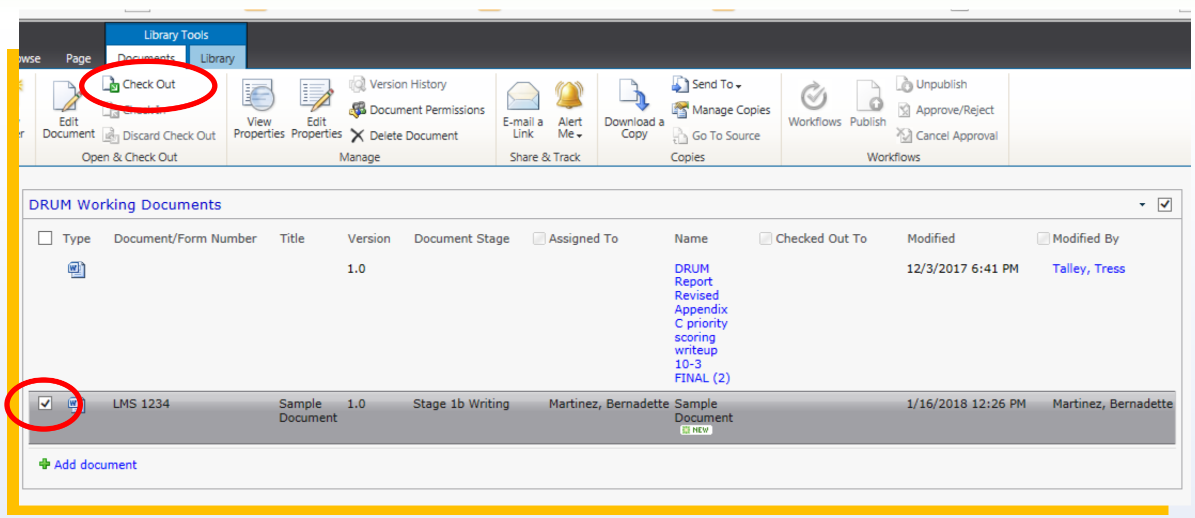
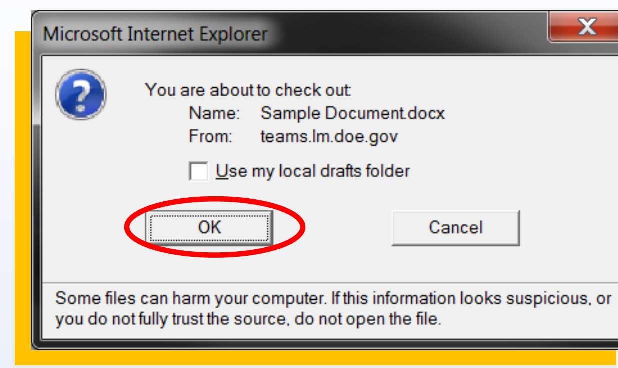
Checking Out Files

You can check out files manually or in the file. To check out a file manually:

- Check the checkbox in front of the file row. You can select multiple files to check out simultaneously.
- On the top ribbon under **Library Tools**, select **Check Out**.
- Click **OK** on the pop-up window.





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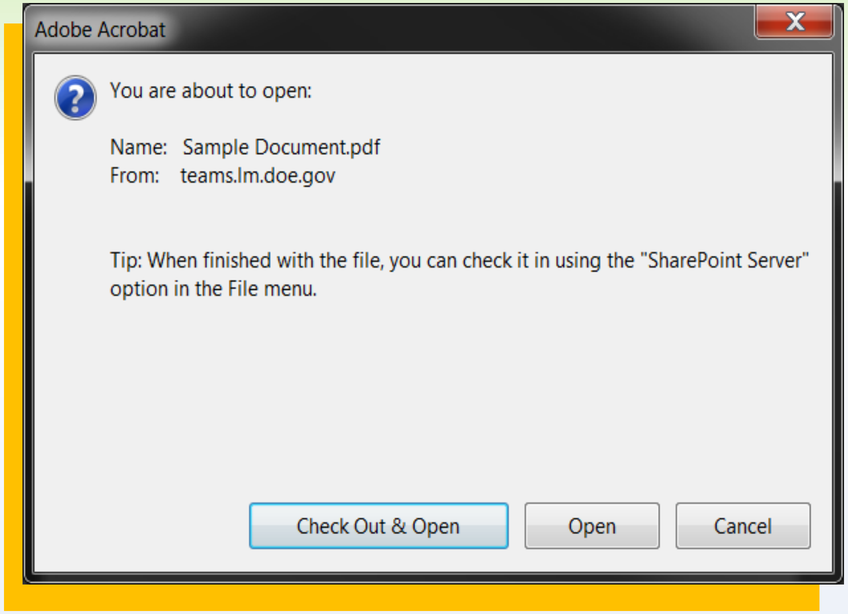
Checking Out Files

- PDF files will prompt you for check out with a dialogue box.
- Click **Check Out & Open** if you want to make any changes, including comments, to the file.



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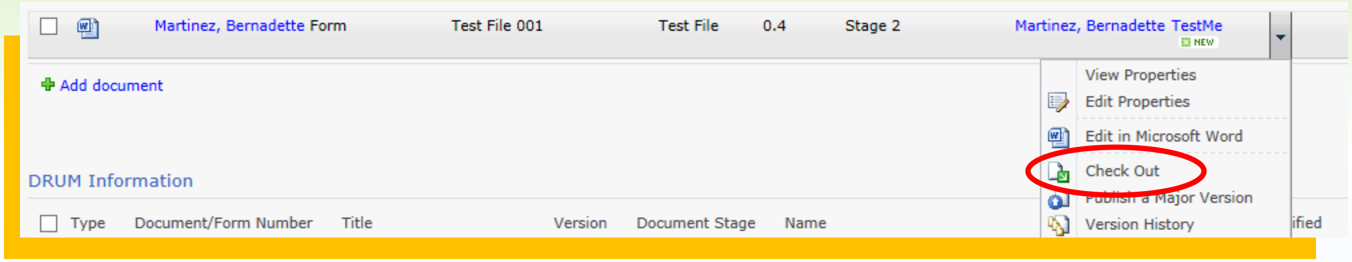
Checking Out Files

You can also click the dropdown arrow to the right of the file name select **Check Out**.



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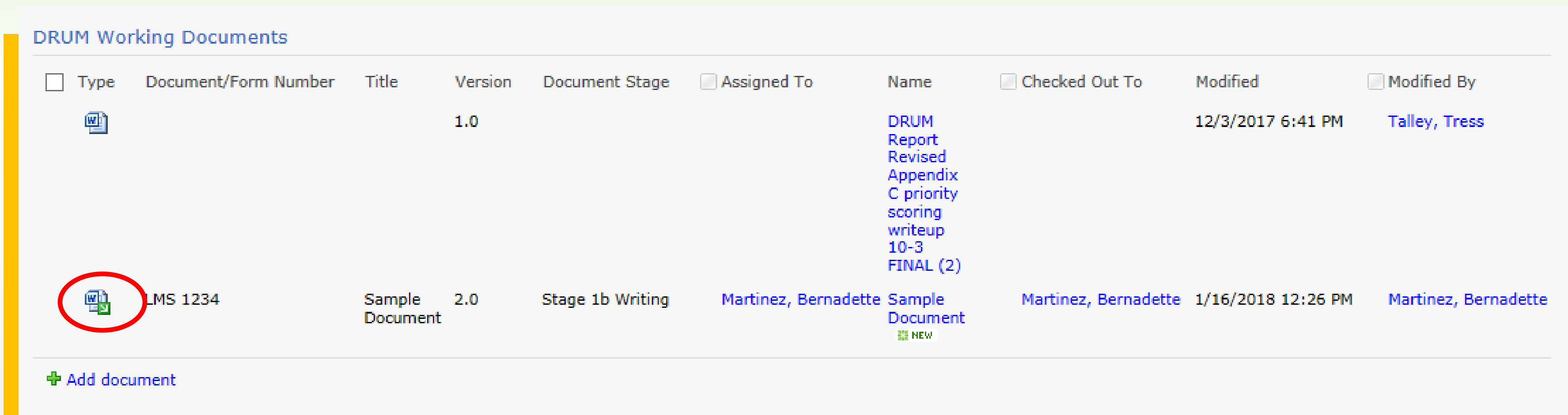
Checking Out Files

The file will **not** open automatically. You must still click on the file name to open the document. The library will update to display who has the file checked out.

Checked out files will always have a green downward-facing arrow to indicate that status.


DRUM Working Documents

Type	Document/Form Number	Title	Version	Document Stage	Assigned To	Name	Checked Out To	Modified	Modified By
			1.0			DRUM Report Revised Appendix C priority scoring writeup 10-3 FINAL (2)		12/3/2017 6:41 PM	Talley, Tress
	LMS 1234	Sample Document	2.0	Stage 1b Writing	Martinez, Bernadette	Sample Document NEW	Martinez, Bernadette	1/16/2018 12:26 PM	Martinez, Bernadette

Add document

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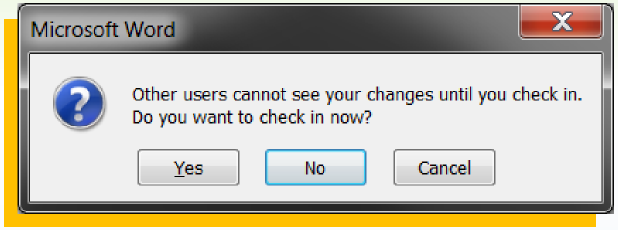
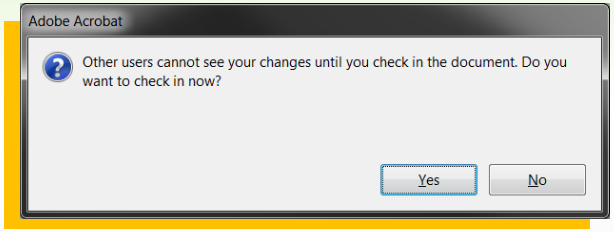
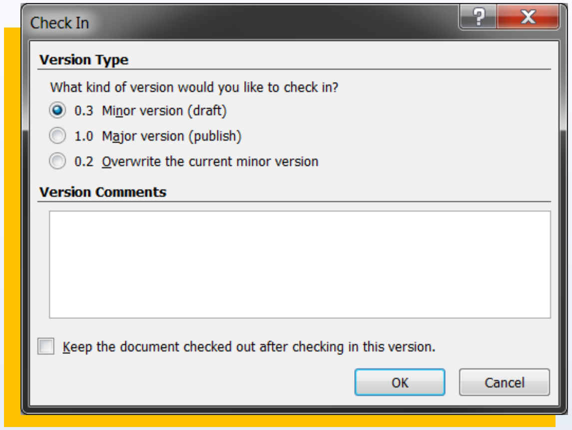
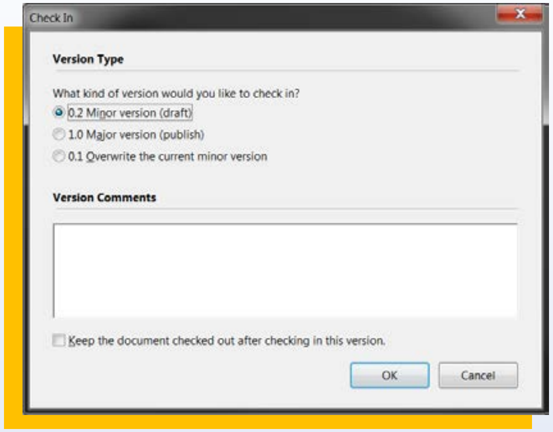
Checking In Files

- Checking in a file can be done by closing the file. Using the **X** in the upper right corner or by going to **File > Exit** menu will prompt a dialog box to check in the file.
- You do not have to check in a file until you are done with your work. Saving the file will save your work, but it will not be visible to others until you check in the document.
- Click **Yes** to check in the file.
- A second dialog will pop and prompt you for the version you want to save and a comment box.
- If you want others to be able to see your changes, but continue working without others editing a file, check the box in front of "Keep the document checked out after checking in this version."
- Click **OK** to save.









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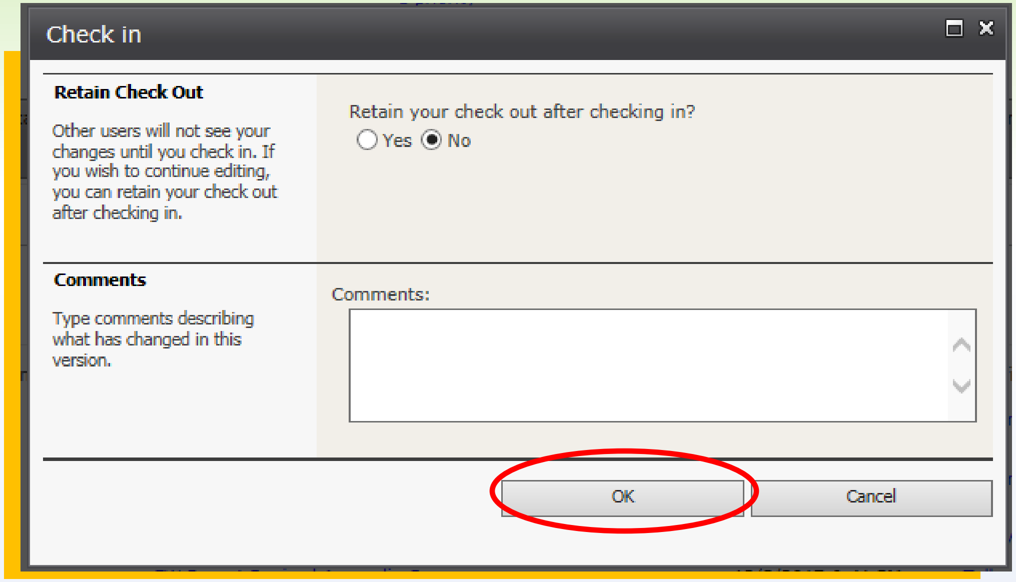
Checking In Files

A pop-up will appear to enter comments about the changes made. Make sure the first question remains defaulted to “No” and click **OK**. The page will refresh and the file will be updated in the library.



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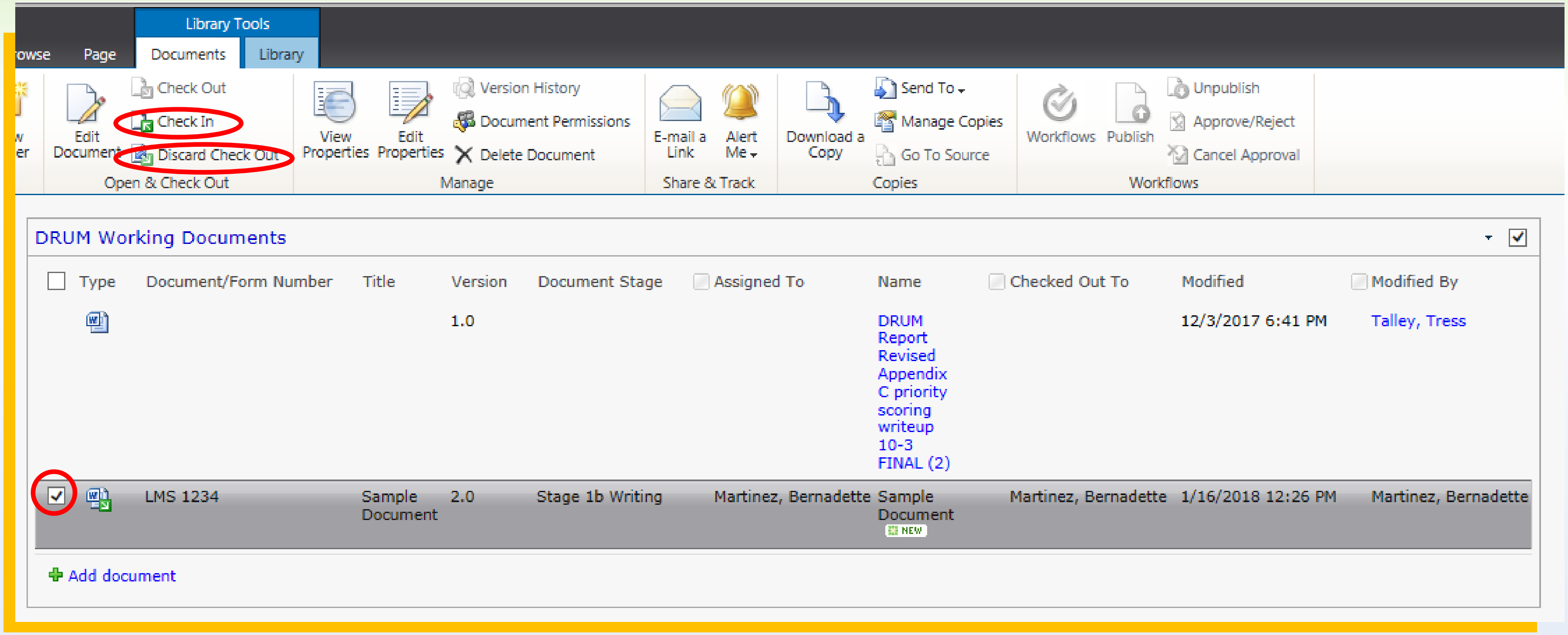
Checking In Files

To check in a document manually, click the checkbox in front of it and click **Check In** from the Library tools ribbon.

If you checked out the file in error and have no changes to make, you can also click **Discard Check Out**.



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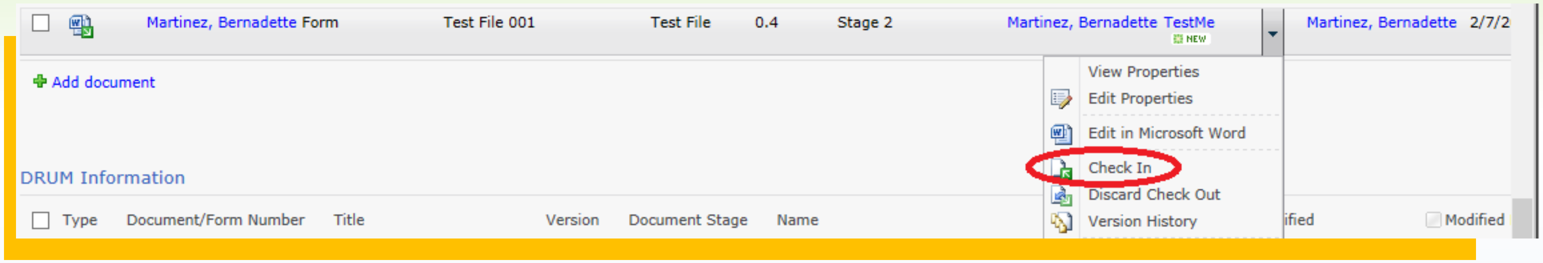
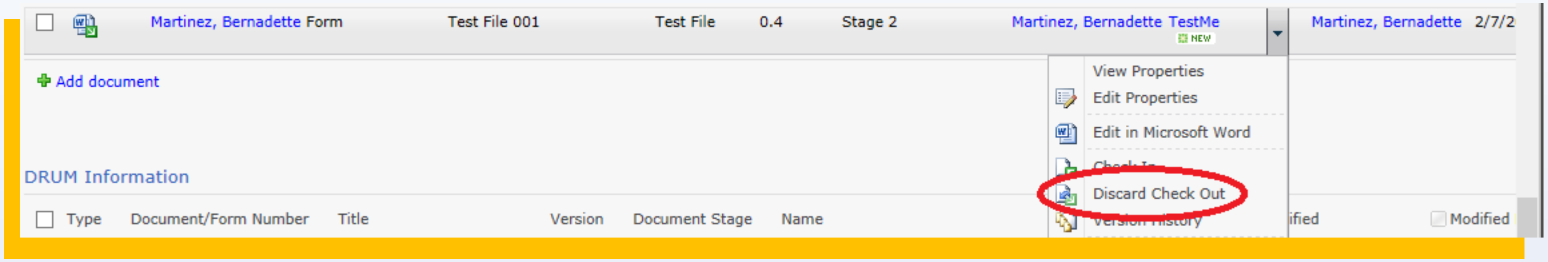
Checking In Files

You can also click the dropdown arrow to the right of the file name select **Check In** or **Discard Check Out**. Checking in the file this way will prompt the same pop up for version and comments.





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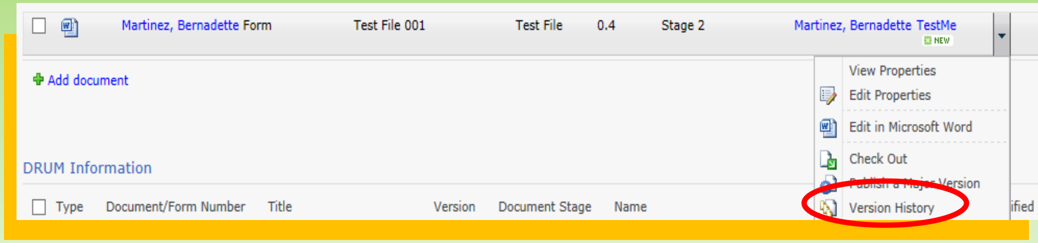
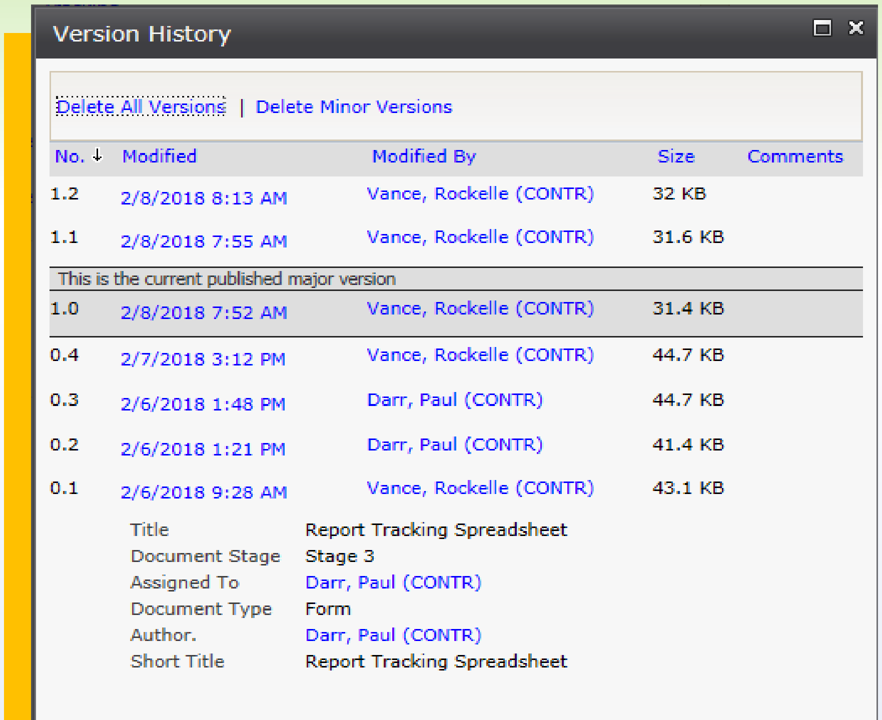
VIEWING PRIOR VERSIONS OF FILES

Viewing Prior Versions of Files

You view the version history of a file in SharePoint. Click the dropdown menu next to any file and select **Version History**.



This will show you the version, the date and time it was modified, who modified it, and the size of the file along with the file properties.



This will not show changes to the file.

Microsoft provides instructions for viewing prior versions here.

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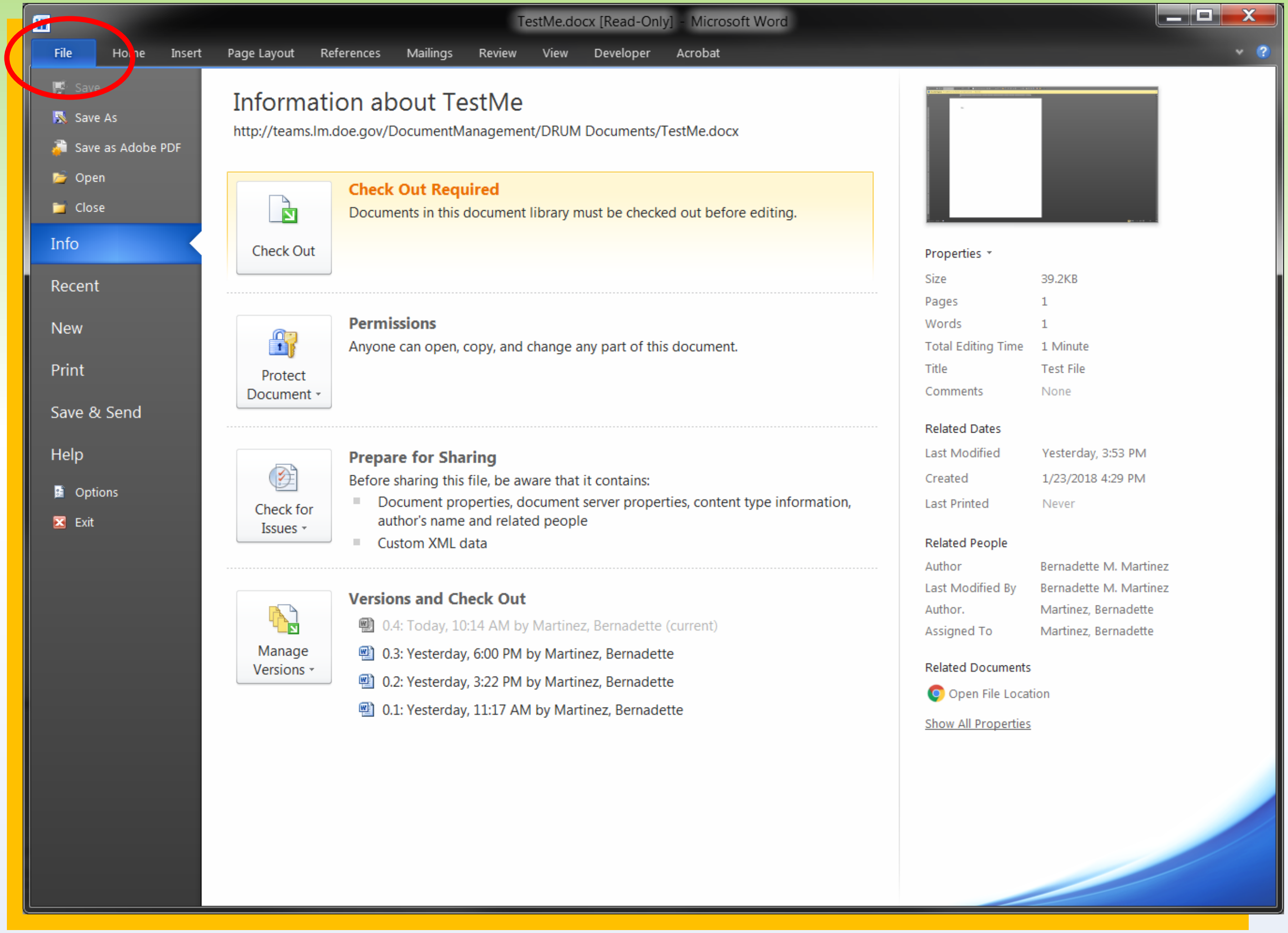
Viewing Prior Versions of Files

You can view previous versions of a file in Word, Excel, or PowerPoint without checking out the file.

To view a previous version, open the file and go to the **File** menu.



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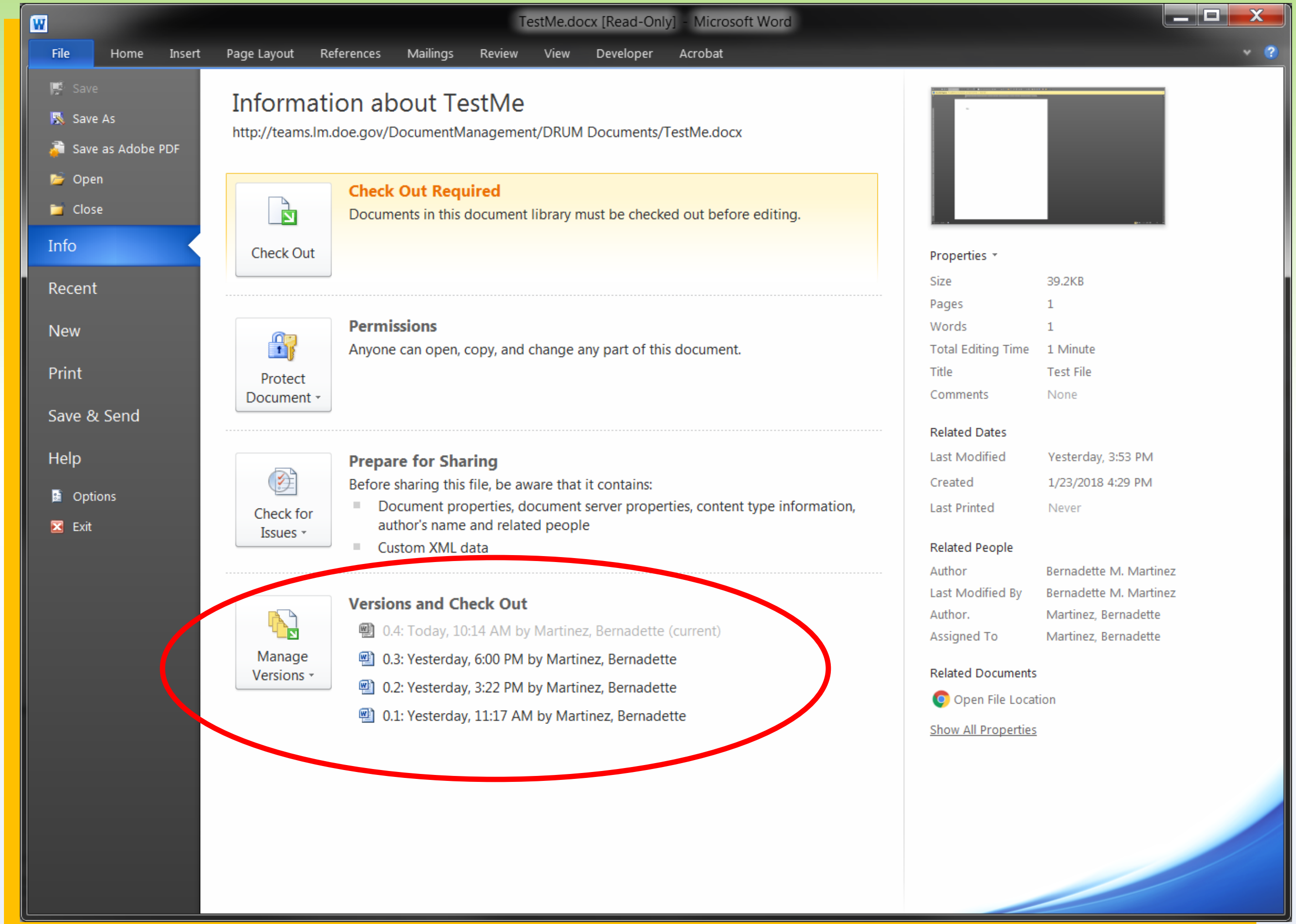
Viewing Prior Versions of Files

Go to **Versions and Check Out**.

Click on any version to open a read-only copy of that version.



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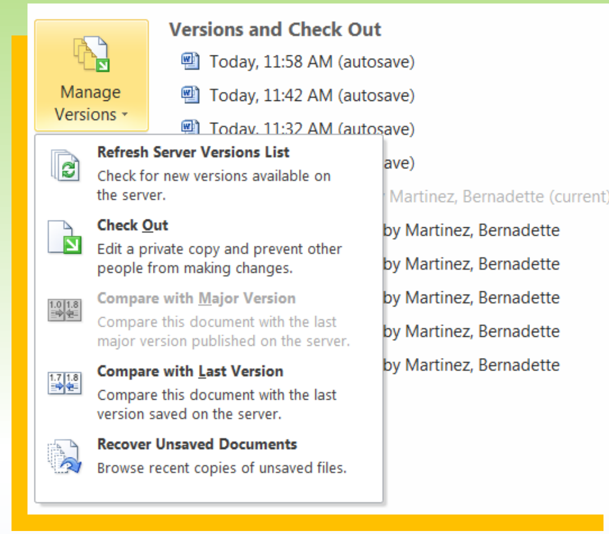
Viewing Prior Versions of Files

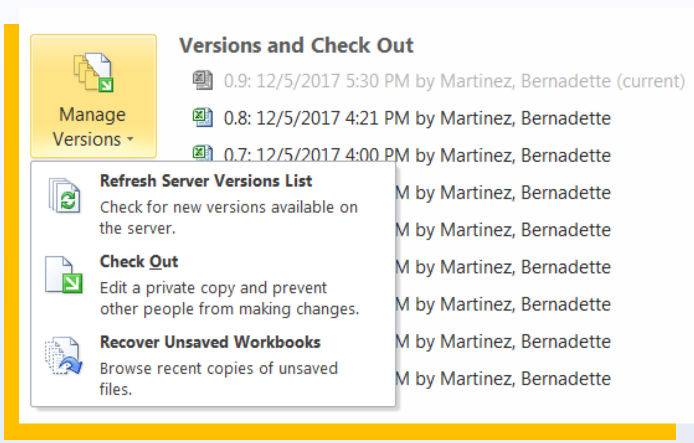
There is a drop down menu under **Manage Versions**. Word, Excel, and PowerPoint will allow you to refresh the version list, check out the file, and recover unsaved files from this list.

Word will also allow you to compare versions in a unique window.

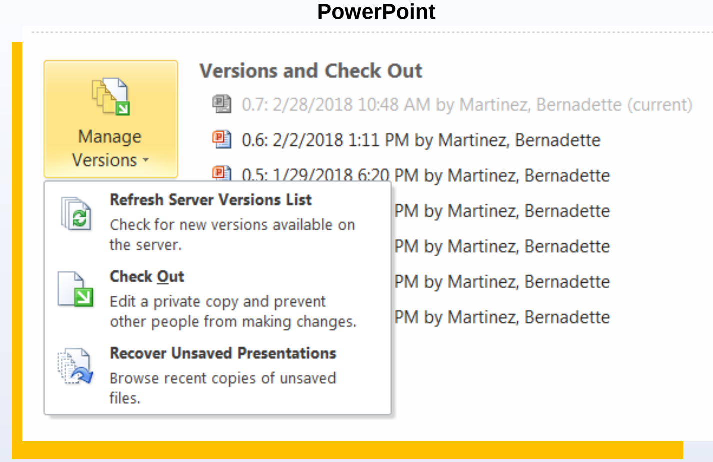
Word



Excel



PowerPoint



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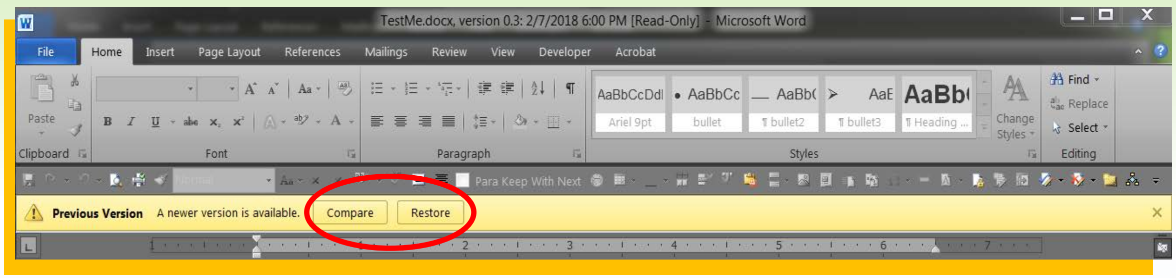
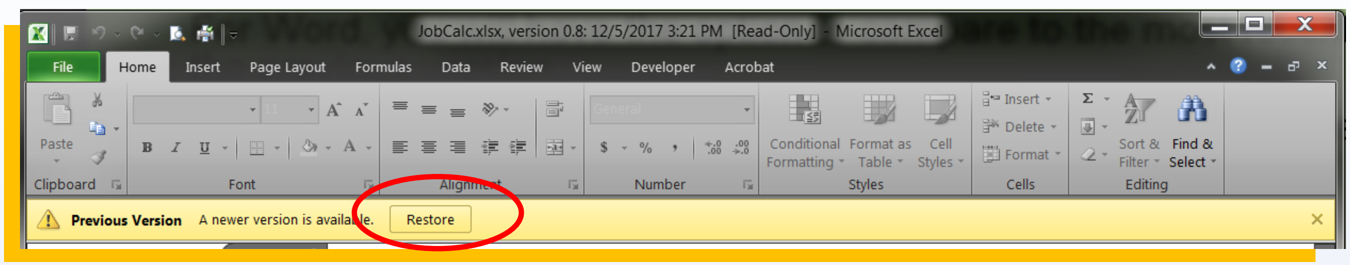
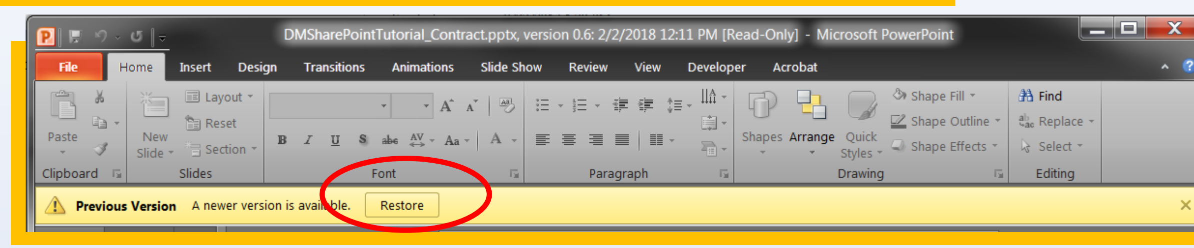
Viewing Prior Versions of Files

The previous version will open in a separate file. For Word, you will have the option to compare to the most recent version or restore the previous version. For Excel and PowerPoint, you will have the option to restore the previous version as the most current.







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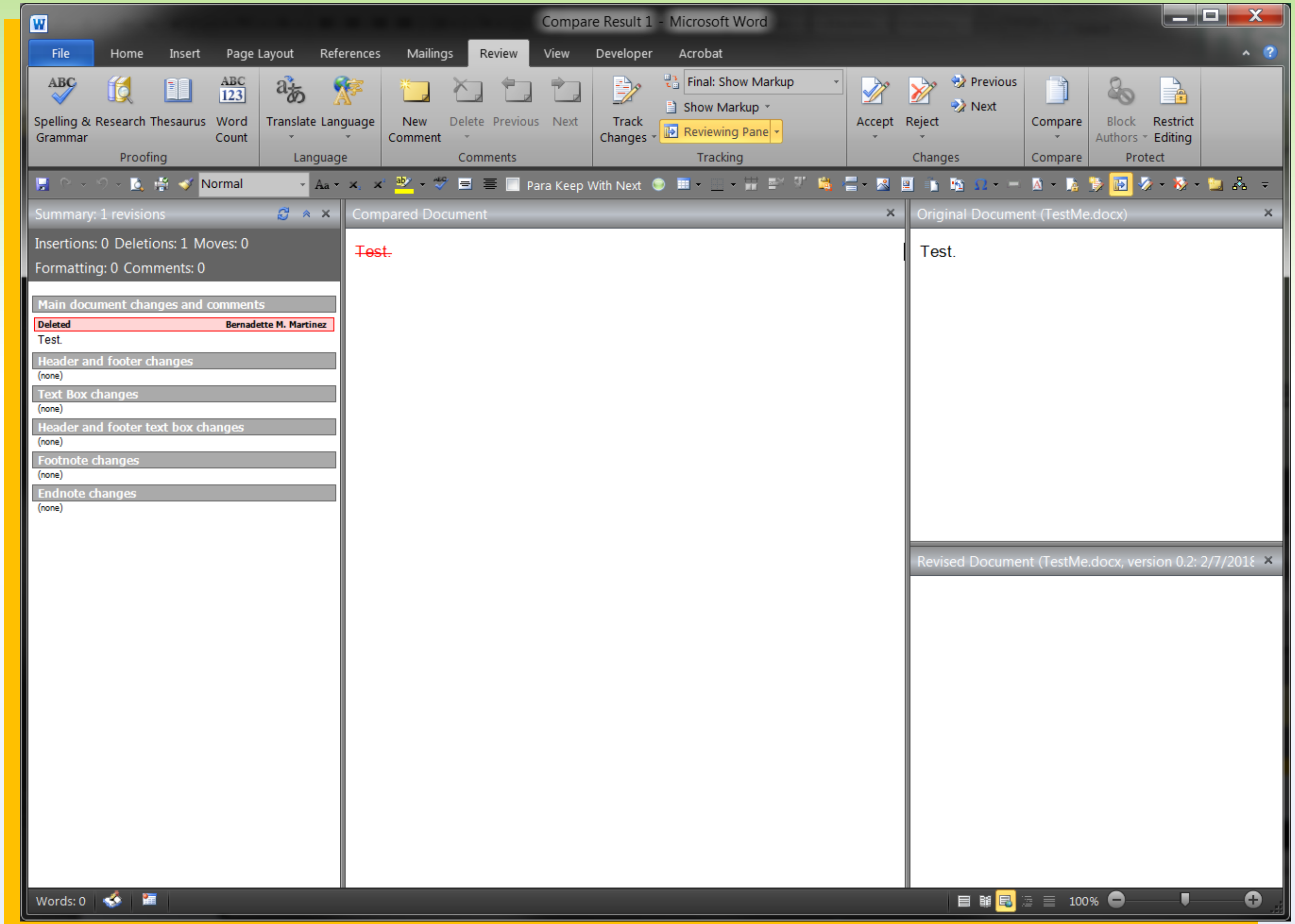
Viewing Prior Versions of Files

Comparing the file in Word will open a window highlighting the changes.



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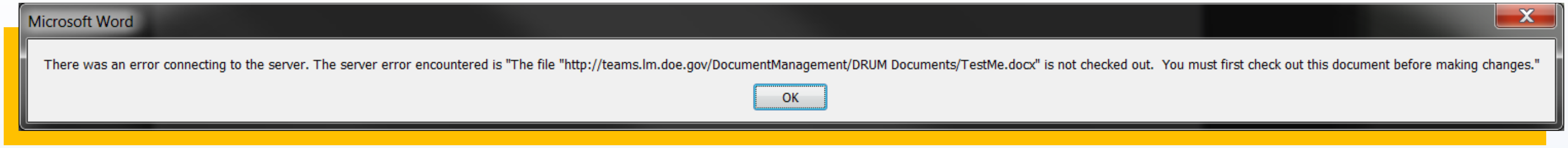
Viewing Prior Versions of Files

If you attempt to restore the file without checking it out, you will receive an error message.

Files generally will not need to be restored.



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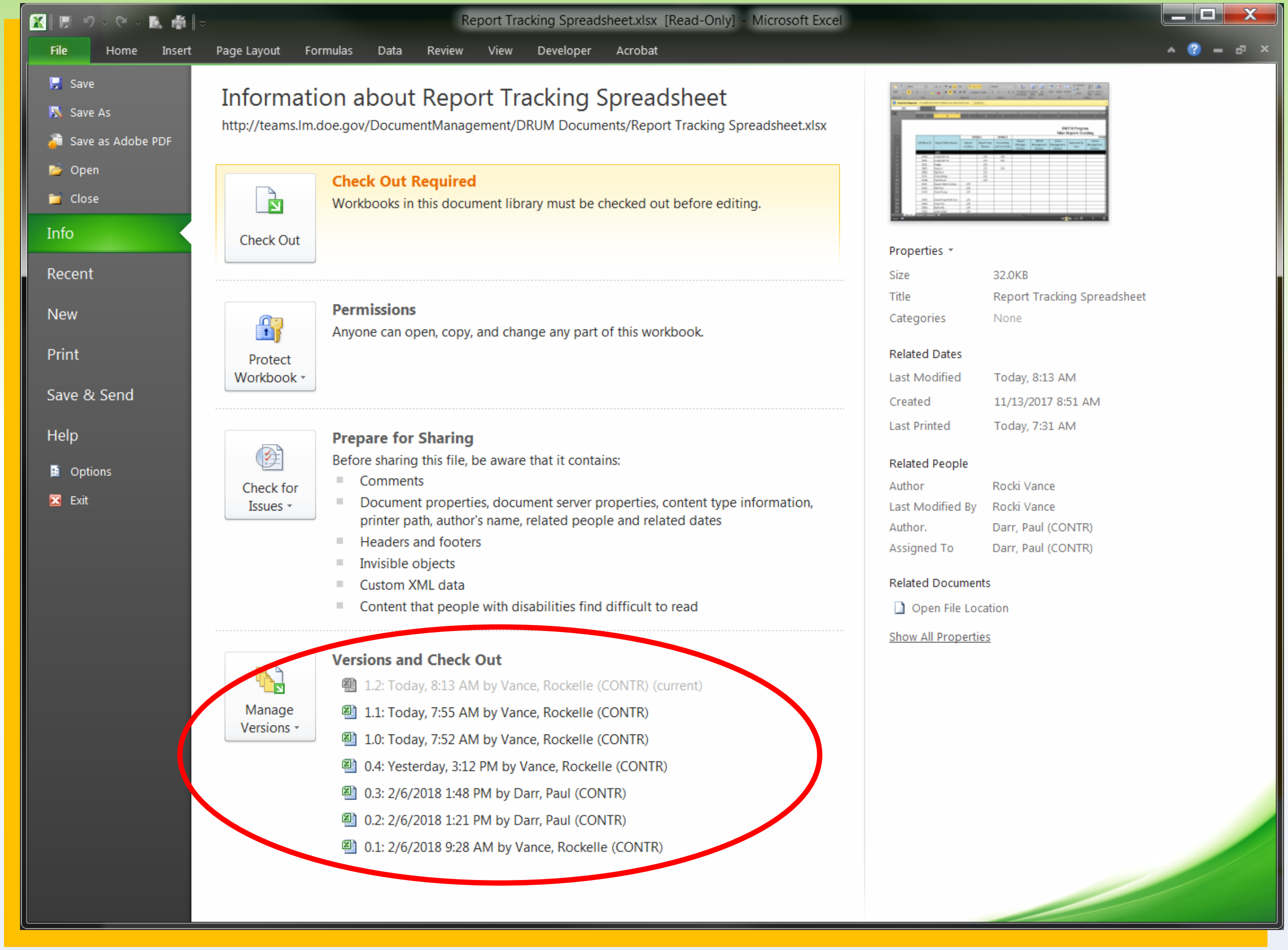
Viewing Prior Versions of Files

You can view prior versions of a file in Word without checking out the file.

To view a prior version, open the Excel file and go to the **File** menu and go to **Versions and Check Out**.

Prior versions can be viewed and restored, but Excel does not offer a compare function.



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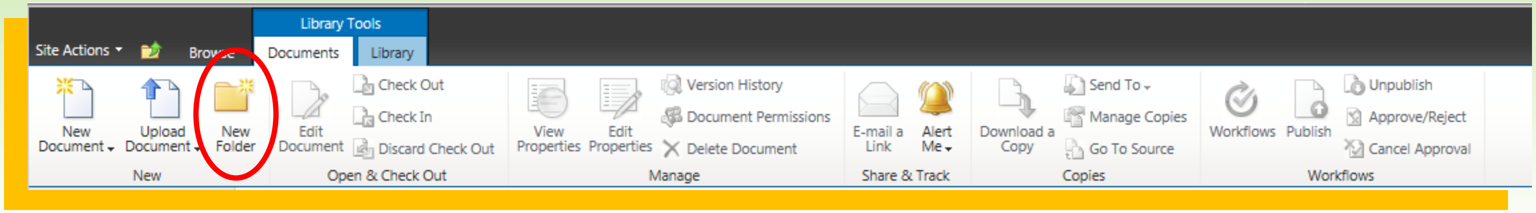
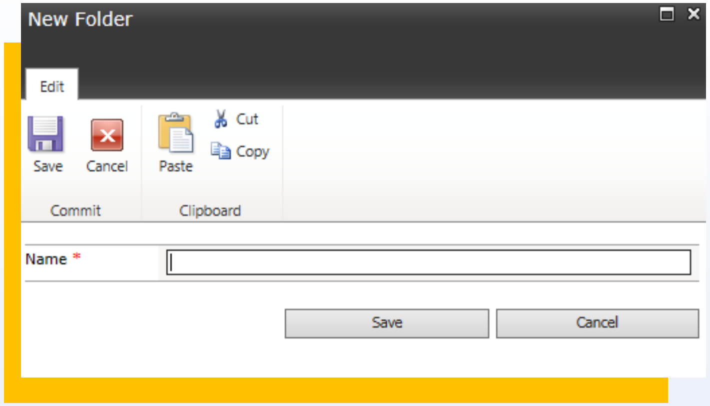
ADDING AND WORKING WITH FOLDERS

Adding and Working with Folders

You can add folders to any SharePoint library to organize files. To add a folder, go to the library you want to add a folder to. Under the **Library Tools > Documents** menu, click **New Folder**.



Add the name of the folder in the **Name** field and click **Save**.



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Adding and Working with Folders

To add new documents to the folder, click the name of the folder under the Name column in the library. The list will reload to display files under that folder or an empty folder, if no files have been added.

Click **Add a document** and follow the normal upload procedure to upload files directly to the desired folder.

DRUM Working Documents

Type	Author.	Document Type	Document/Form Number	Short Title	Version	Document Stage	Assigned To	Name
					1.0			Annex Mine Report
					1.0			5416 Tramp 2
					1.0			Rusty 5
	Zutman, Marci (CONTR)	Mine report			1.7	Working draft	Zutman, Marci (CONTR)	Appendix Risk Scoring Criteria
	Zutman, Marci (CONTR)				1.8	Final report	Zutman, Marci (CONTR)	Appendix A Investigation Methods
	Zutman, Marci (CONTR)	Mine report			1.8	Final report	Zutman, Marci (CONTR)	Appendix B Glossary
	Zutman, Marci (CONTR)	Mine report			1.6	Final draft	Zutman, Marci (CONTR)	Appendix Risk Scoring

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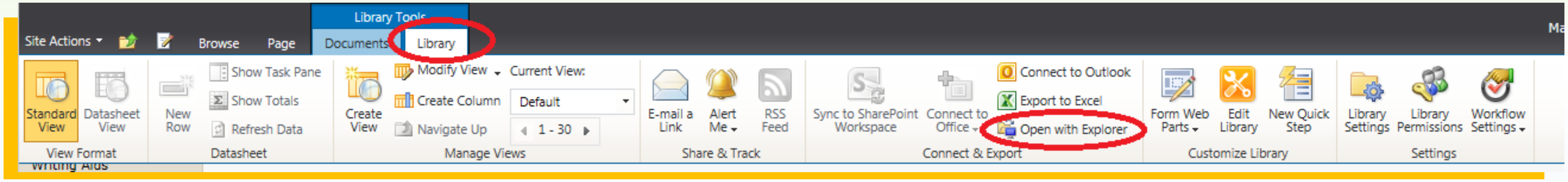
Windows Explorer View

To add existing files to the folder, go to the **Library Tools > Library** menu and click **Open with Explorer** in the ribbon.



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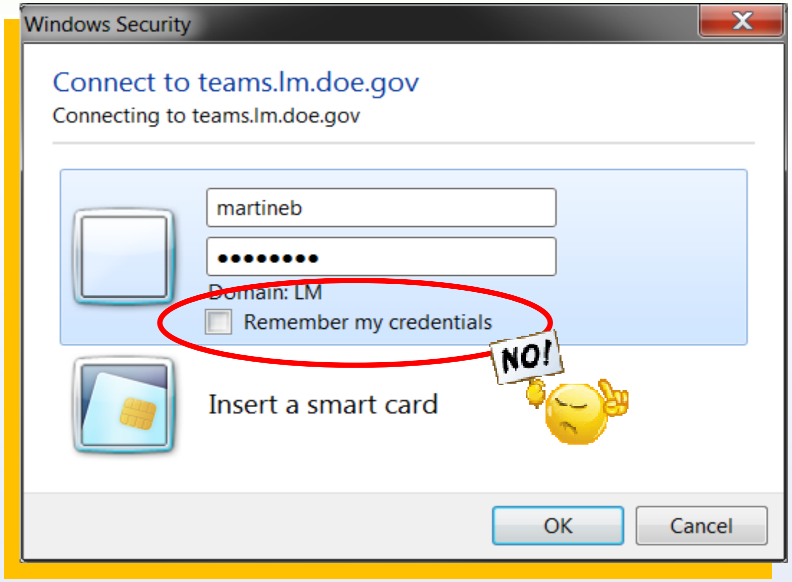
Windows Explorer View

The first time you open this each day, you will receive a login screen. Use your Windows/McAfee login information.

- Do not use your PIV information.
- Do not click "Remember my credentials"
- If you get an error message, you need to delete the temporary files from Internet Explorer, follow the steps in Deleting Temporary Internet Files.



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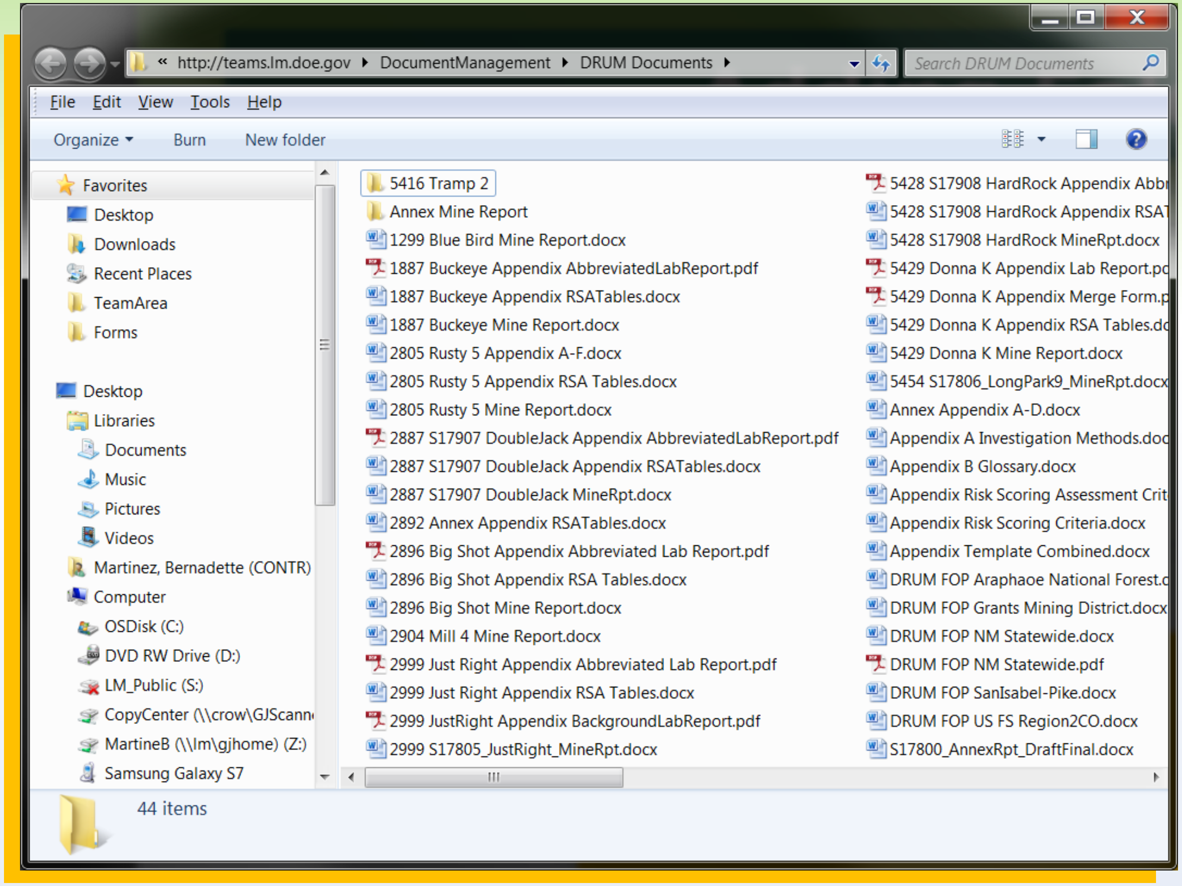
Windows Explorer View

A typical folder window will open on your desktop. This functions like any other Windows folder.



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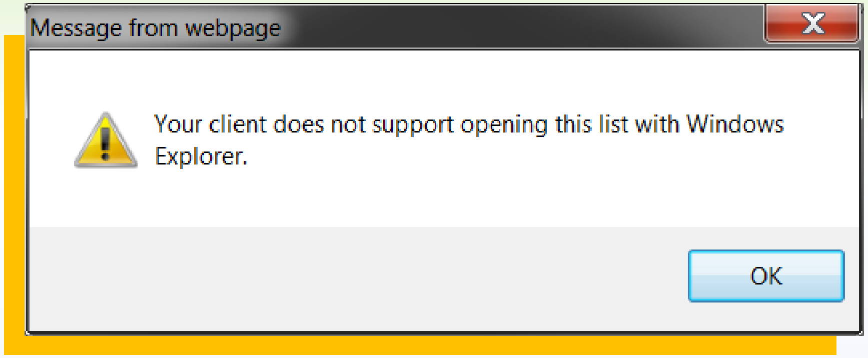
Deleting Temporary Internet Files

If you cannot open the Windows Explorer view from SharePoint at any time or receive an error message stating the client doesn’t support opening the list with Windows Explorer, these steps **must** be taken.



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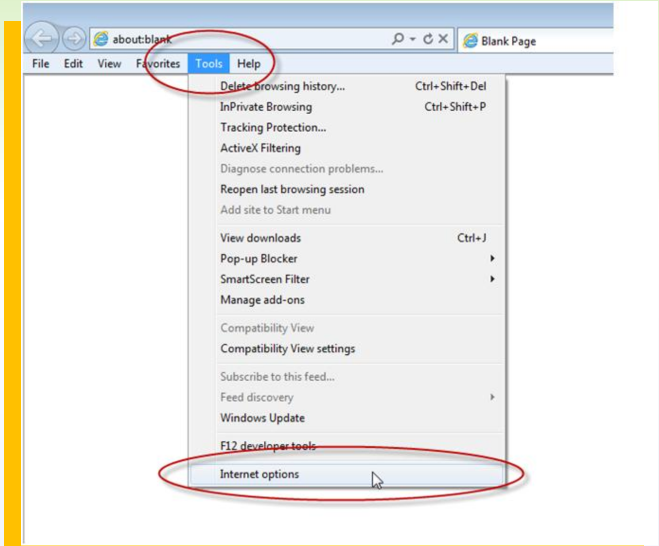
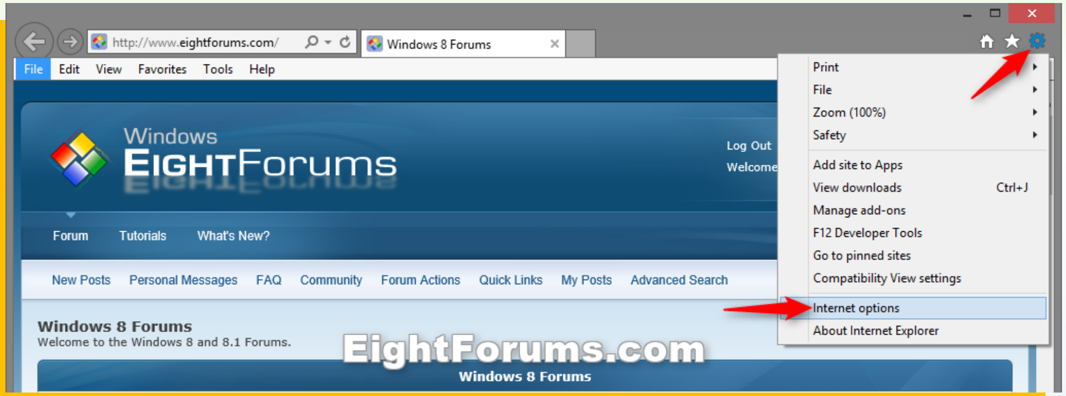
Deleting Temporary Internet Files

- Open Internet Explorer and go to **Tools** > **Internet options**.
- You can also access the **gear** in the upper right corner and select **Internet options**.





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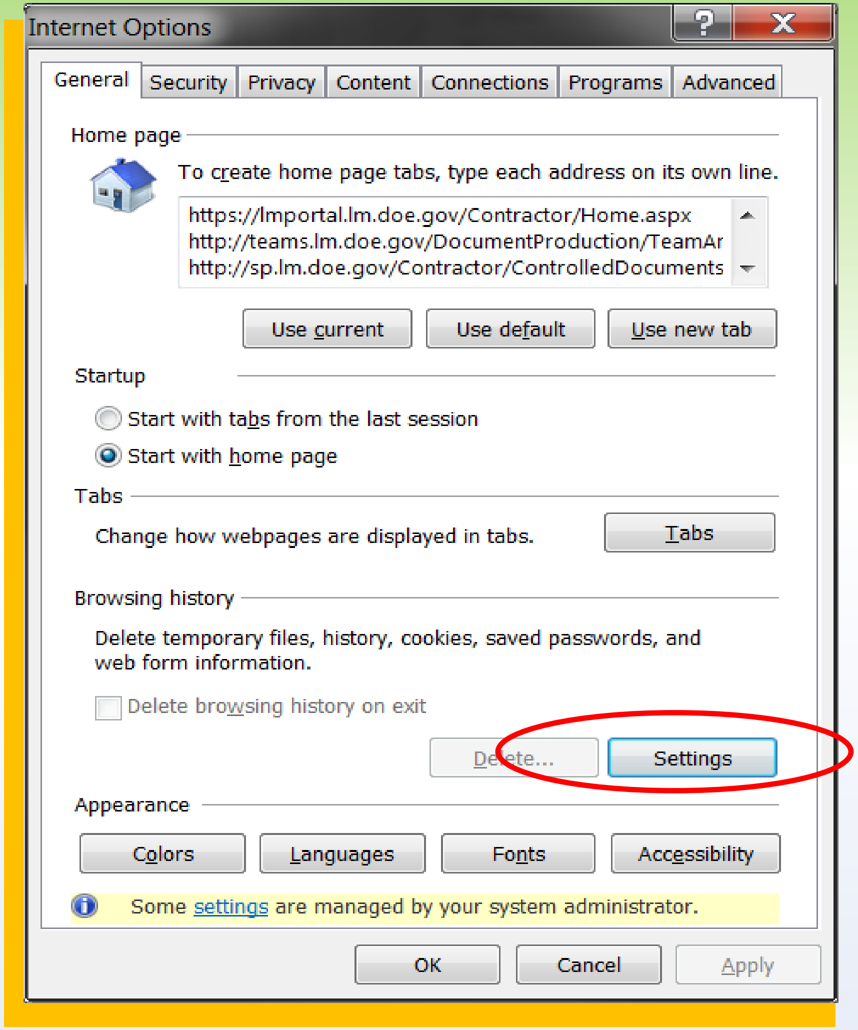
Deleting Temporary Internet Files

- Click **Settings**.



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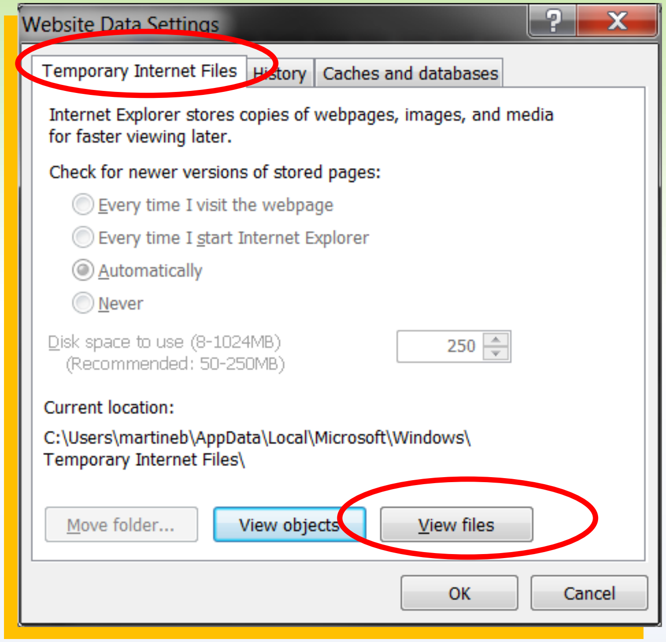
Deleting Temporary Internet Files

- Click **Temporary Internet Files > View Files**.



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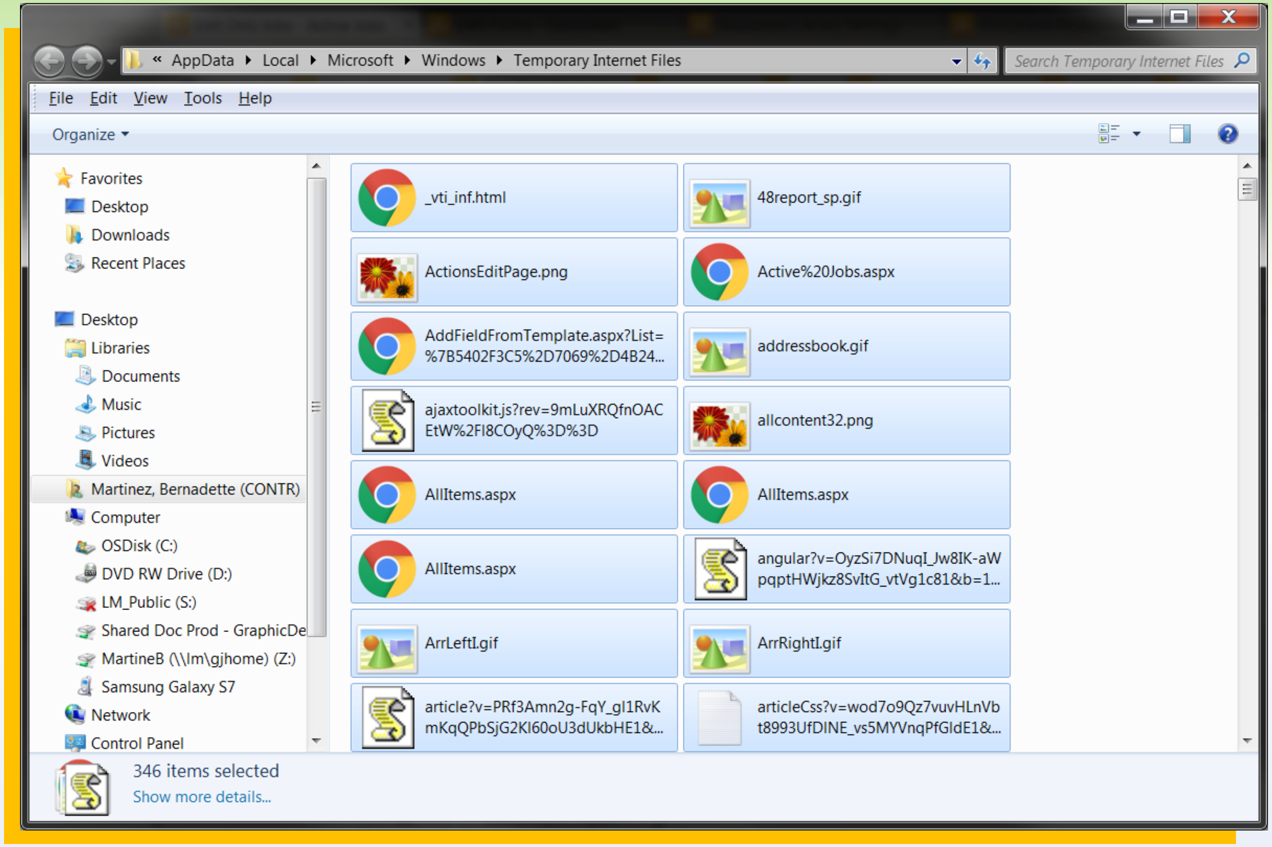
Deleting Temporary Internet Files

- In the folder that opens, select all files and delete them.



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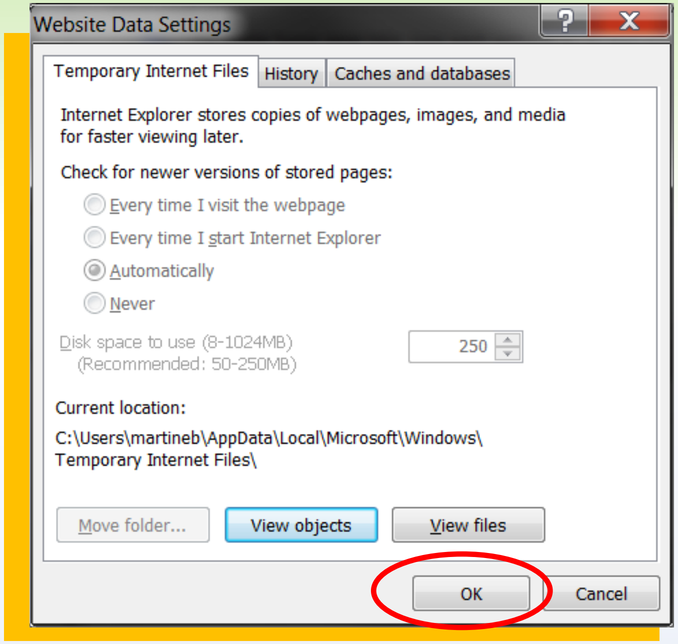
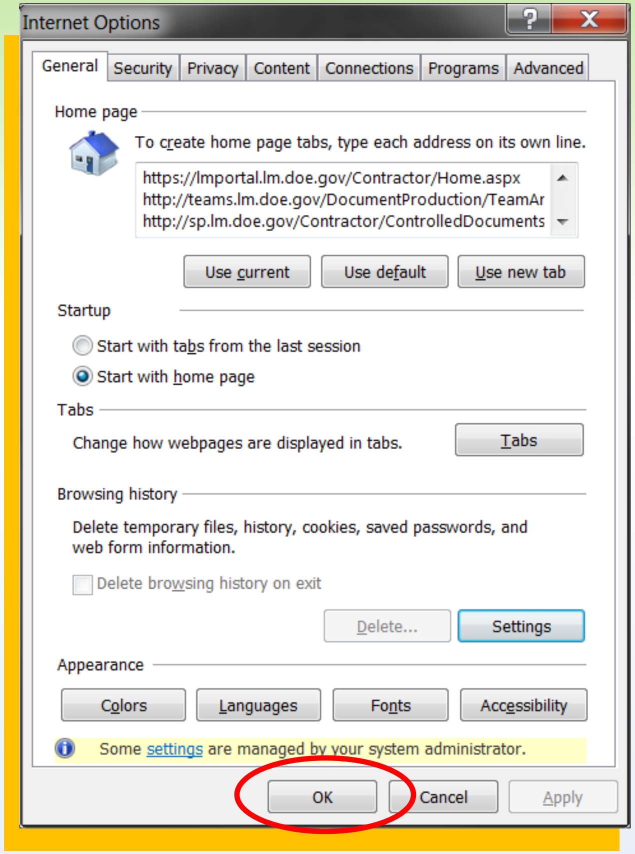
Deleting Temporary Internet Files

- Click OK to close the two open system windows. You should now be able to open the Windows Explorer view in SharePoint.





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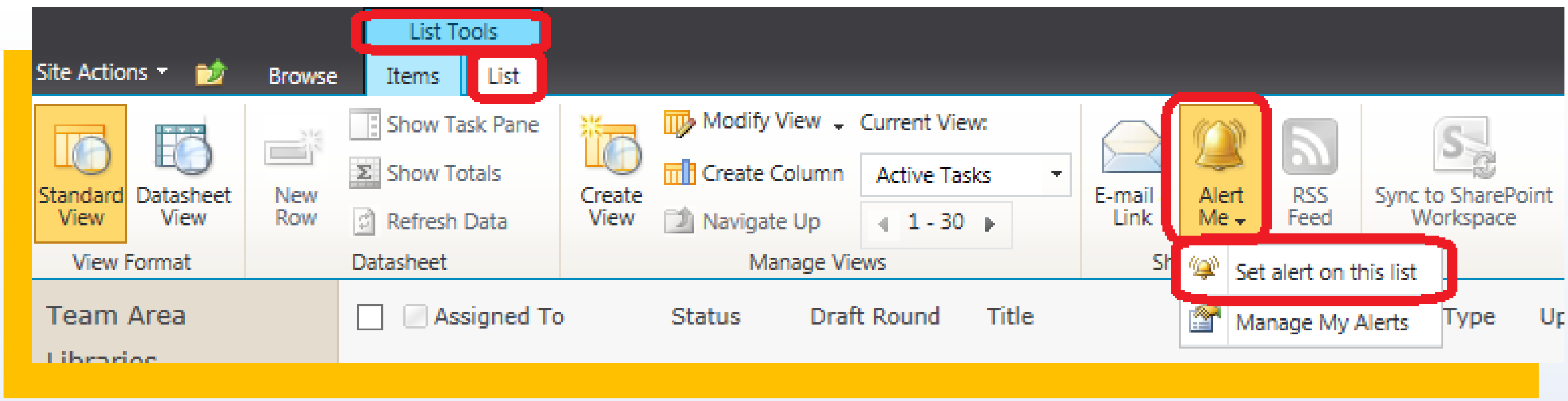
ALERTS

Alerts

Alerts let you know when a document, list, or library is updated based on criteria you set.

To set an alert on a list or library, navigate to the list or library. Under **Library Tools > List (Library)** click the dropdown menu under **Alert Me** and select **Set alert on this list (library)**.



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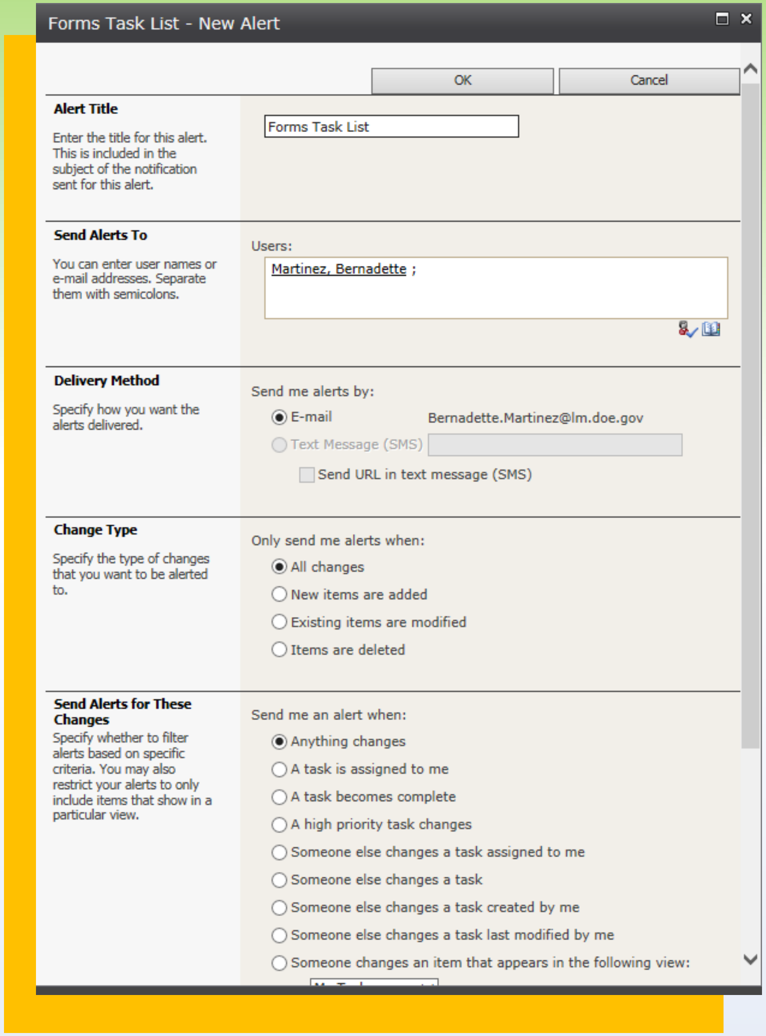
Alerts

Select the criteria for the alert and click **OK**.

Libraries and lists will have different options.



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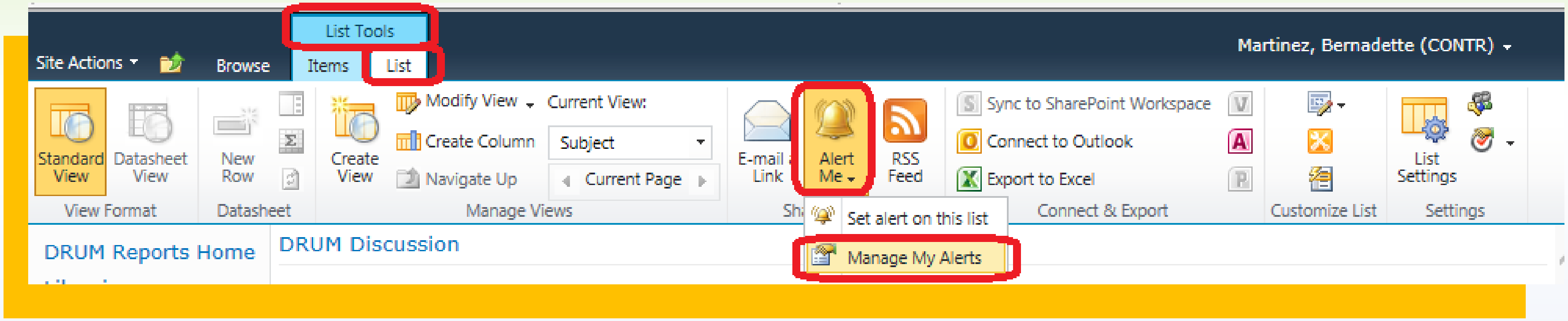
Alerts

To delete or update an alert on a list or library, navigate to the list or library. Under **Library Tools > List (Library)** click the dropdown menu under **Alert Me** and select **Manage My Alerts**.



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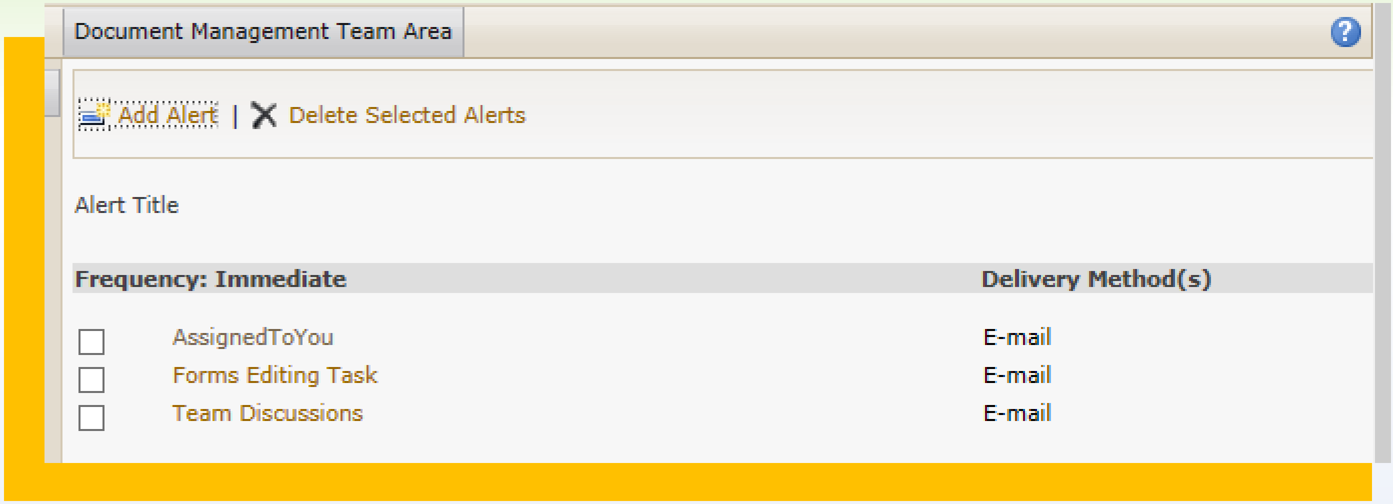
Alerts

Click the alert name to modify it. To delete an alert, click the checkbox and click **Delete Selected Alert**.



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HELP AND INFORMATION

Help and Information

- The SharePoint How-To site has a great deal of information available for training, knowledge, and instruction.
- The FAQ page has many common questions answered.
- If there are network issues, check your email for an **Employee News** or **LM Information Management** message.
- If you want to have a more intensive, self-guided explanation of SharePoint, I recommend the following beginner-level Lynda.com presentations. Lynda.com is free to use with a Mesa County library card.
  - SharePoint 2010 Essential Training
  - Learning SharePoint 2010

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