

Dalhousie Libraries

Introduction to SharePoint

March 19, 2014

Exercise 1 – Login and Navigate SharePoint (5 Minutes)

Login to SharePoint

1. Go to _____
2. Username: _____
3. Password: _____

Go to University Libraries SharePoint Site

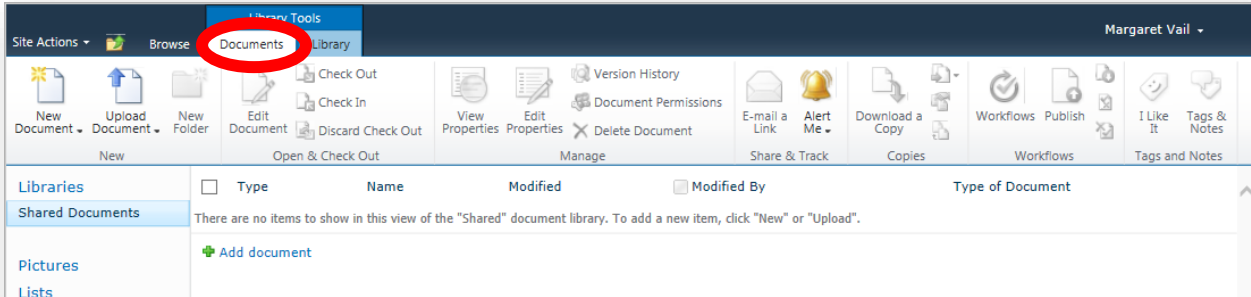
1. Under the heading **Browse by University Structure->Administration** click **Libraries**

Go to the SharePoint Training Subsite

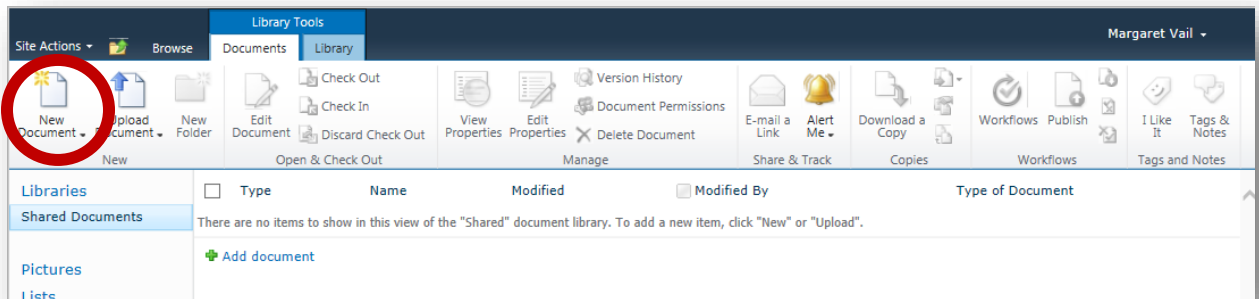
1. Under the heading **My Teams** click **SharePoint Training**

Exercise 2 – Create a Document in SharePoint (5 Minutes)

1. In the left hand navigation click on **Shared Documents**
2. Click the **Documents** tab in the Ribbon.



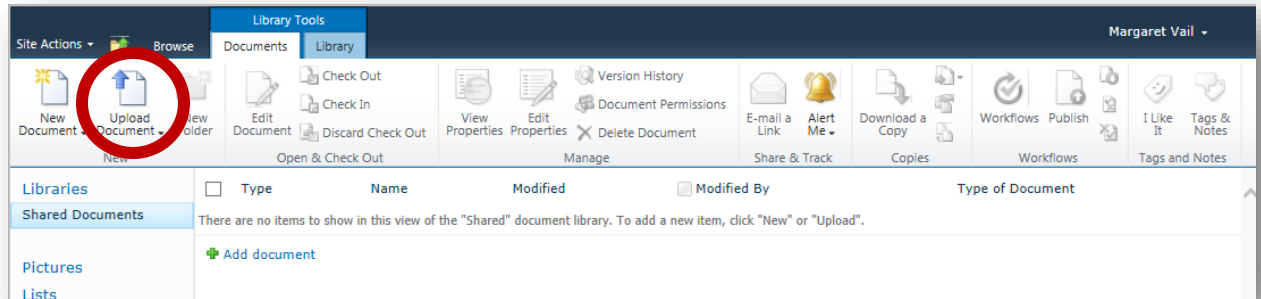
3. Click, **New Document**



4. You will now have an Open Document Dialogue Box, click **OK**
5. Enter your username and password when prompted.
6. You may have to enable editing on the word document that opens.
7. Write something in your word document.
8. Fill out any required metadata
9. Click Save
10. It may save automatically to SharePoint, or you may get the **Save As** screen.
11. If you get the **Save As** screen, select **Other Web Locations** and then **Current Folder**
12. Choose a file name and click **Save**
13. You can now close your word document and refresh your page in SharePoint.
14. You should now see your document in the list of documents.

Exercise 3 – Upload a Document to SharePoint (5 Minutes)

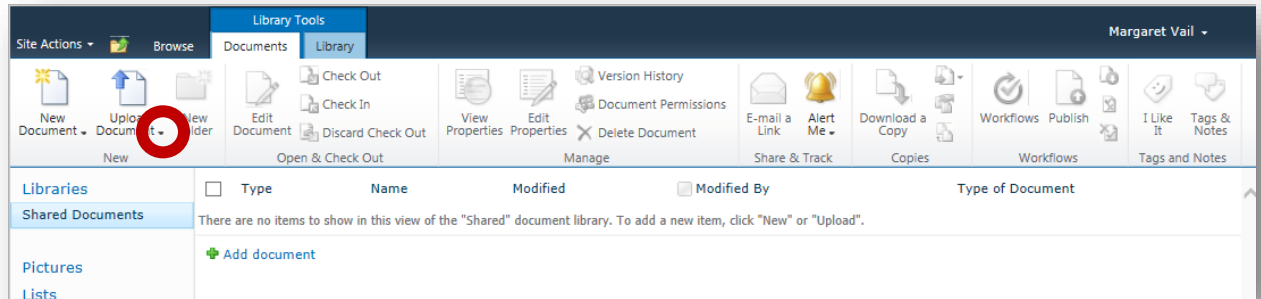
1. Create a test document (word, excel, text, etc) on your computer
2. In the **Shared Document Library**, click the **Documents** Tab then **Upload Document** button



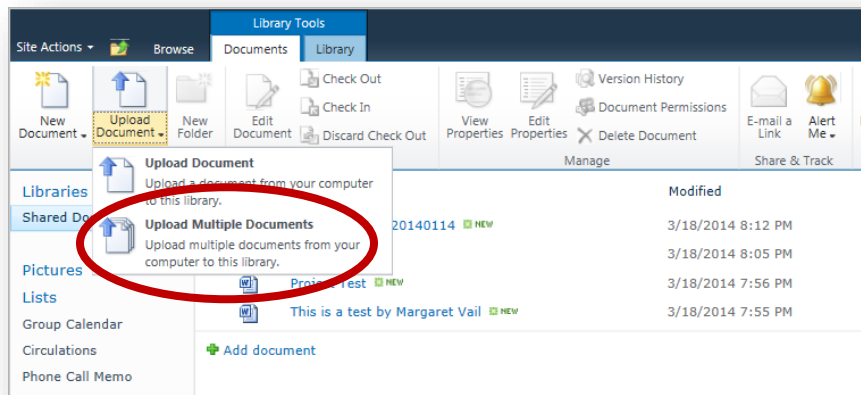
3. Click the **Browse** button, and find the document you want to upload
4. Optionally, add version comments
5. Click **OK**
6. Fill in the required Metadata fields
7. Click **Save**

Exercise 4 – Upload Multiple Documents to SharePoint (7 Minutes)

1. Create two more test documents (word, excel, text, etc) on your computer
2. In the **Shared Document Library**, click the **Documents** Tab then down arrow on **Upload Document** button



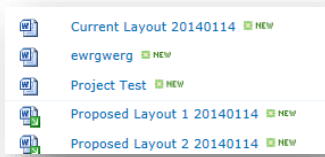
3. Select **Upload Multiple Documents**



NOTE: This will only work in Internet Explorer.

NOTE 2: You may have to enable Active X settings. If this is the case a yellow bar will appear at the bottom of your browser and you will have to approve it.

4. Drag Files to the specified area OR Click the **Browse** button, and find the document you want to upload
5. Click **OK**
6. Your files will now be uploaded, but there is a small arrow icon on the picture.



7. Look at your neighbours computer, you will not be able to find your document on their account.
8. The following exercise will explain this further.

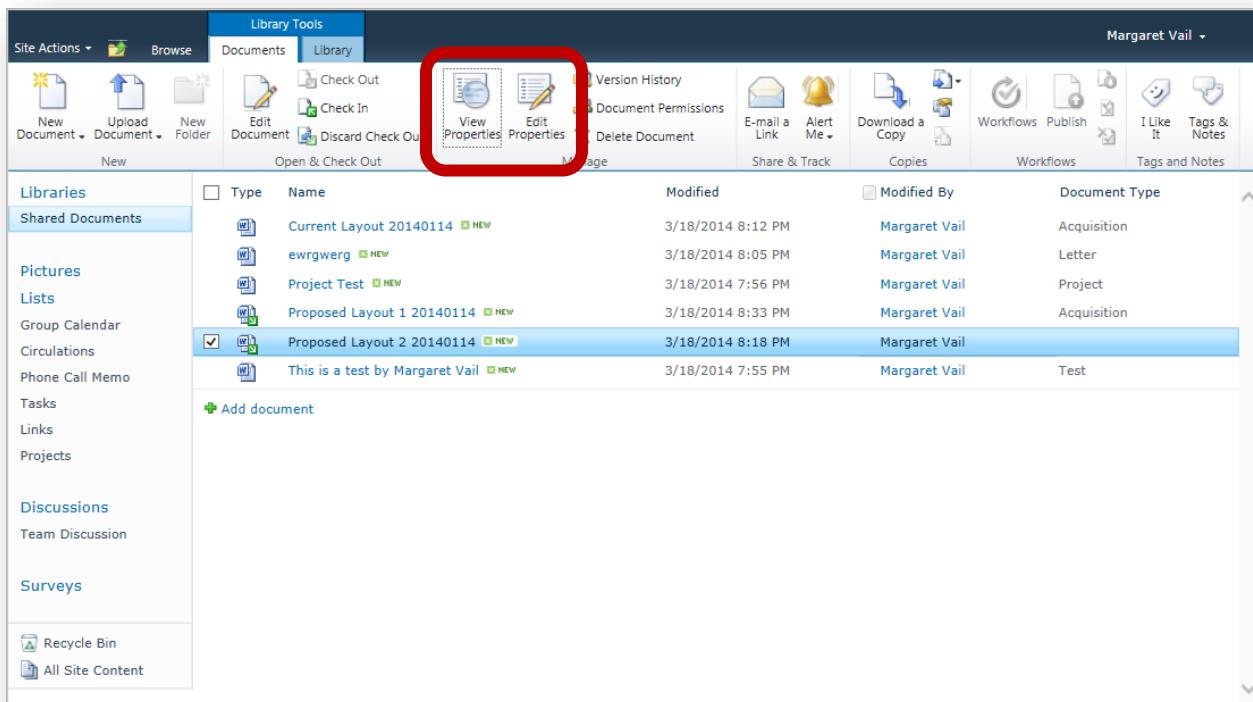
Exercise 5 – View / Edit Properties on a Document in SharePoint (7 Minutes)

To View Properties:

1. Click the check box next to one of your documents
2. Click **Library Tools->Documents->View Properties**
3. Read the properties, see what else you are able to do
4. Click Close

To Edit Properties:

1. Click the check box next to one of your documents
2. Click **Library Tools->Documents->Edit Properties**
3. Fill out any required or missing fields
4. Click **Save**



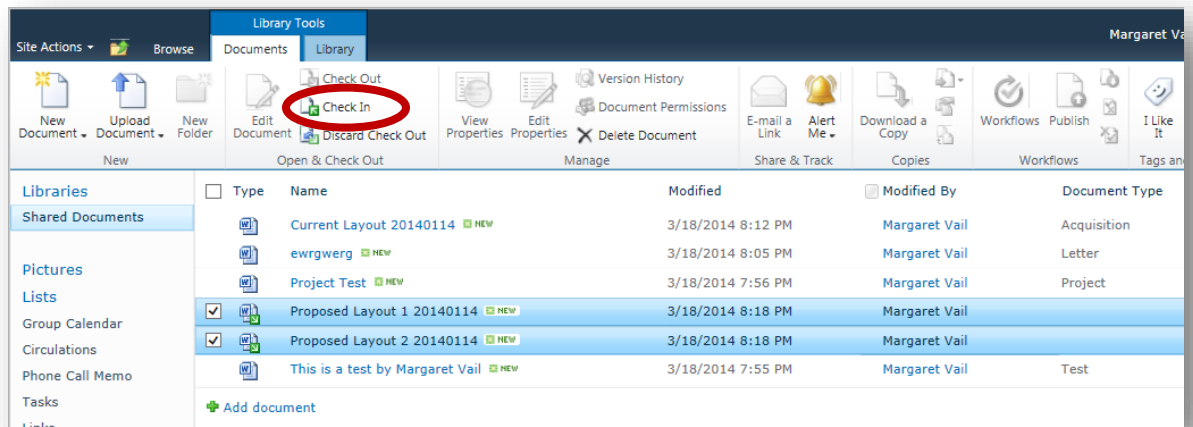
The screenshot shows the SharePoint interface for a document library. The 'Library Tools' ribbon is active, and the 'Documents' group is selected. The 'View Properties' and 'Edit Properties' buttons are highlighted with a red box. Below the ribbon, a table of documents is displayed, with the document 'Proposed Layout 2 20140114' selected. The table columns are Type, Name, Modified, Modified By, and Document Type.

Type	Name	Modified	Modified By	Document Type
<input type="checkbox"/>	Current Layout 20140114 NEW	3/18/2014 8:12 PM	Margaret Vail	Acquisition
<input type="checkbox"/>	ewrgwerg NEW	3/18/2014 8:05 PM	Margaret Vail	Letter
<input type="checkbox"/>	Project Test NEW	3/18/2014 7:56 PM	Margaret Vail	Project
<input type="checkbox"/>	Proposed Layout 1 20140114 NEW	3/18/2014 8:33 PM	Margaret Vail	Acquisition
<input checked="" type="checkbox"/>	Proposed Layout 2 20140114 NEW	3/18/2014 8:18 PM	Margaret Vail	
<input type="checkbox"/>	This is a test by Margaret Vail NEW	3/18/2014 7:55 PM	Margaret Vail	Test

Exercise 6 – Check-Out / Check-In a Document in SharePoint (7 Minutes)

Check In Documents:

1. Individually edit the properties of each document you uploaded in your multiple upload.
Note: All required fields must be filled out
2. Check the boxes next to your Checked-Out documents.
3. Click **Library Tools->Documents->Check In**



4. Fill out the options:
 - a. Major or Minor Version
 - b. Retain Check Out
 - c. Version Comments
5. Click **OK**

Check Out Documents:

1. Check the box next to the Document you wish to check out
2. Click **Library Tools->Documents->Check Out**
3. You will now see that the document is checked out to you.

Exercise 7 – View / Edit a Document in SharePoint (7 Minutes)

View a Document (Office Document):

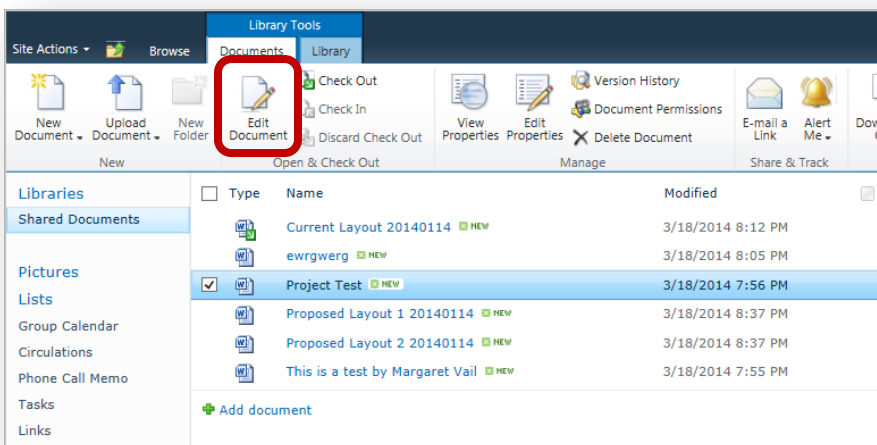
1. Click on the Name of the Document you want to view
2. Select **Read Only**
3. Click **OK**

Open a Document for Editing Option 1(Office Document):

1. Click on the Name of the Document you want to view
2. Select **Library Tools->Documents->Edit Document**
3. Click **OK**

Open a Document for Editing Option 2 (Office Document):

1. Check the boxes next to your documents
2. Click **Library Tools->Documents->Edit**



Save your Edited Document (Office Document):

1. Open a Document for Editing
2. Make Changes to your document
3. Press **Ctrl+S** or click the **Save** button in Word

Note: If you open a non-Microsoft Office document you will have to save the document to your computer, edit it, and re-upload it to SharePoint.

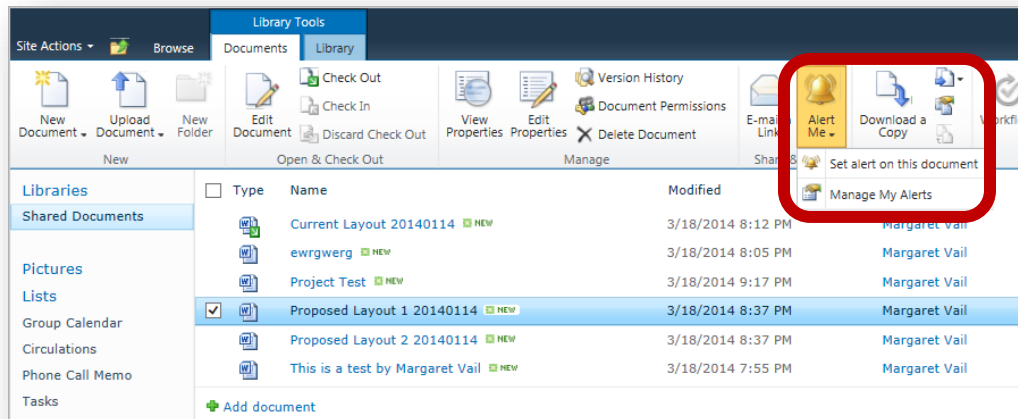
Try to edit your neighbour's Checked-Out Document:

1. Try to open your neighbour's checked-out document
2. Check your document back in, and have your neighbour do the same.
3. Now try editing it again.

Exercise 8 – Setup an Alert on a Document in SharePoint (7 Minutes)

Create an alert:

1. Check the box next to the document you want to have an alert on
2. Click **Library Tools->Documents->Alert Me->Set alert on this document**



3. Fill out the details and click **OK**

Test the alert with your neighbour:

1. Talk to your neighbour to find out which document they set the alert on.
2. Make edit your neighbour's document that the alert is set on.
3. When your neighbour is finished editing your document, see if you get an email alert.

Exercise 9 – Filter a list of Documents in SharePoint (5 Minutes)

1. Click the drop down arrow next to a column heading
2. Select an option you want to filter on.
3. Select any sorting you wish to do.
4. Repeat on a second, up to all columns.

The screenshot shows a SharePoint document library interface. The main content area displays a list of documents with columns for Type, Name, Modified, and Modified By. A dropdown menu is open for the 'Document Type' column, showing options for sorting (Ascending, Descending) and filtering (Acquisition, Letter, Project, Test). The dropdown menu is highlighted with a red circle.

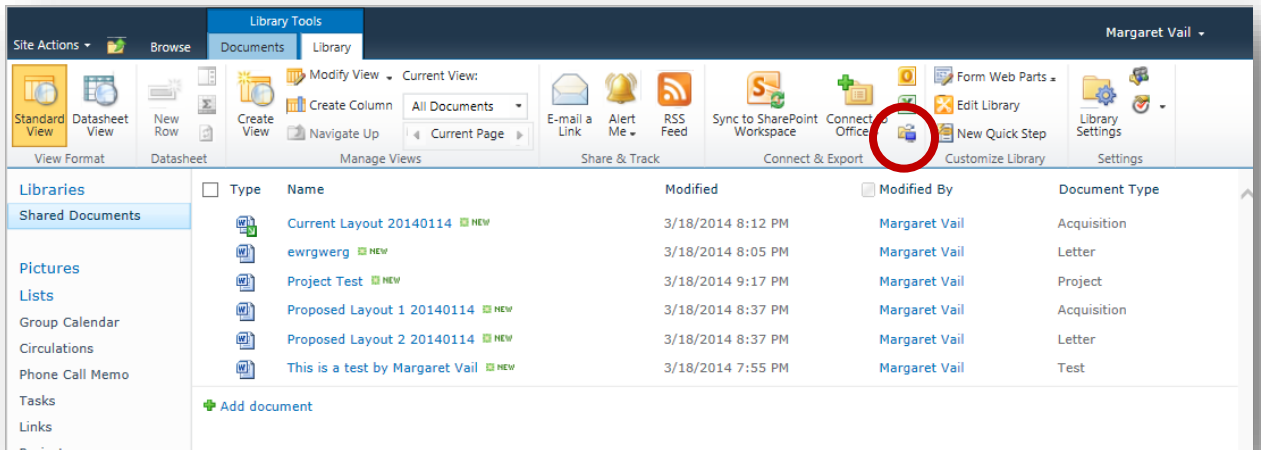
Type	Name	Modified	Modified By
	Current Layout 20140114 NEW	3/18/2014 8:12 PM	Margaret Va
	ewrgwerg NEW	3/18/2014 8:05 PM	Margaret Va
	Project Test NEW	3/18/2014 9:17 PM	Margaret Va
<input checked="" type="checkbox"/>	Proposed Layout 1 20140114 NEW	3/18/2014 8:37 PM	Margaret Va
	Proposed Layout 2 20140114 NEW	3/18/2014 8:37 PM	Margaret Va
	This is a test by Margaret Vail NEW	3/18/2014 7:55 PM	Margaret Va

Document Type dropdown menu options:

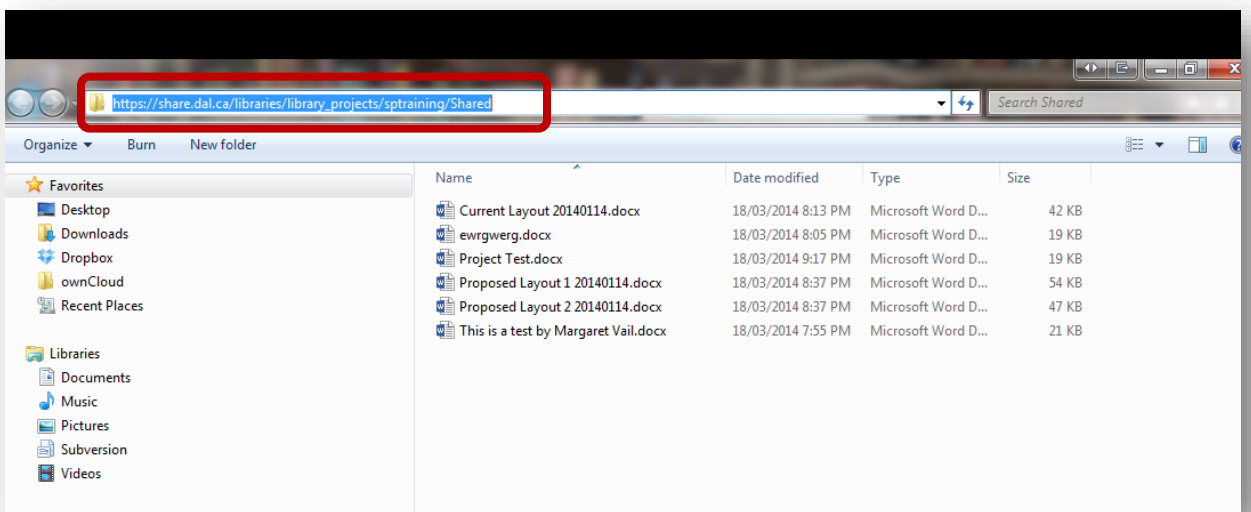
- Ascending
- Descending
- Clear Filter from Document Type
- Acquisition
- Letter
- Project
- Test

Exercise 10 – Map a Document Library to your computer (7 Minutes)

1. Login to Novell (if you are not already)
2. Click on **Library Tools->Library->Open with Explorer**

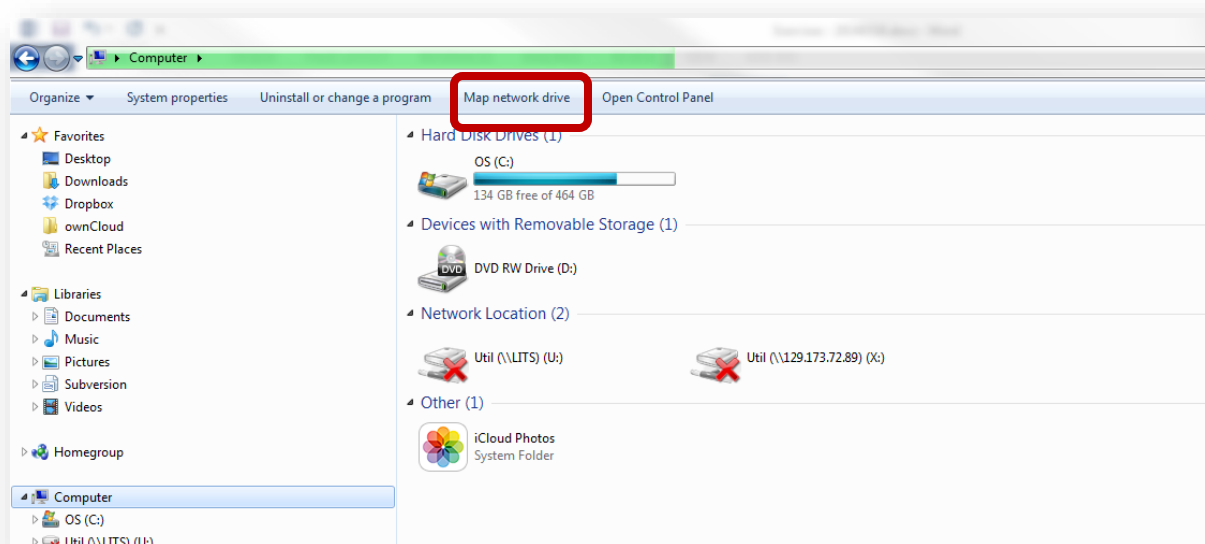


3. Enter your username and password as directed
4. Copy Path from windows explorer



NOTE: You can only do this step from Internet Explorer

5. Open **My Computer**



6. Click ***Map network drive***
7. Paste the URL you got from step 3
8. Check ***Reconnect at logon*** and ***Connect using different credentials***
9. Click ***Finish***
10. Enter username and password as required