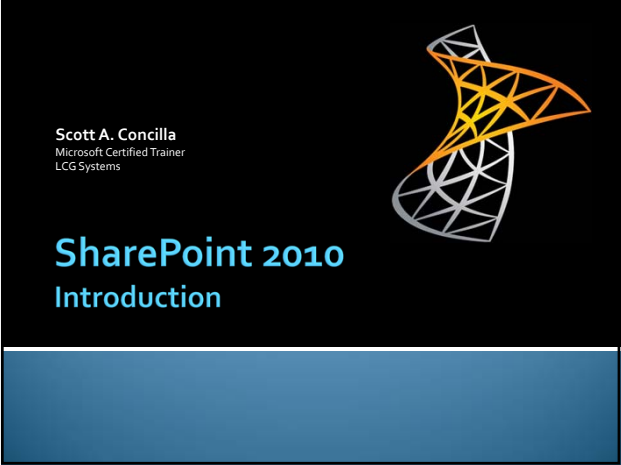




SHAREPOINT 2010

INTRODUCTION





Class Scope and Purpose

- Description
 - This class serves as a basic introduction to SharePoint 2010 and its features.
- Audience
 - All SharePoint end users and site owners.
- Prerequisite
 - None

Class Main Topics

- Product History
- Understanding SharePoint
- SharePoint Structure
- Navigating a SharePoint Site
- SharePoint Security
- SharePoint Content Categories
- Office Integration
- Searching SharePoint
- Using Alerts

Product History

- Microsoft Office History
- Microsoft SharePoint History

4

Microsoft Office History

- Office is a mature product.
 - Has been around for over 25 years.
 - First version of Word – 1983.
 - Current version is 2010 (v14).
 - Products have been through many changes, updates, and bug fixes.
 - People are familiar with these products because they have been around so long.

95
↓
97
↓
2000
↓
XP
↓
2003
↓
2007
↓
2010

5

Microsoft SharePoint History

- SharePoint is a fairly young product.
 - First "version" appeared in 2001.
 - Current versions are 2007 and 2010.
 - Microsoft continues to enhance the product with each new version.
 - People aren't as familiar with this product because it has not been around as long as Office.

2001
↓
2003
↓
2007
↓
2010

6


Understanding SharePoint

- Defining SharePoint
- Purpose of SharePoint
- Using SharePoint
- What SharePoint Isn't
- Major SharePoint Features
- Browser Compatibility
- Browser Best Practice

7

Defining SharePoint


- A web-based document and content management system.
- Users work in a collaborative environment that facilitates sharing.



8

Purpose of SharePoint


- SharePoint is used to create and manage interactive web sites and their content.
 - Portals
 - Intranets
 - Extranets
 - Standard websites



9

Using SharePoint


- SharePoint is accessed via a web browser and used like other online applications such as Gmail or Facebook.
- Use SharePoint to **collaborate** on and **share** documents with other users.



10

What SharePoint Isn't

- SharePoint is not software that needs to be installed onto a computer.
- SharePoint is not a replacement for your personal network share drive or storage.



11


Major SharePoint Features

<ul style="list-style-type: none"> ▪ Document libraries ▪ Lists ▪ Calendars ▪ Contact lists ▪ Tasks ▪ Discussion boards ▪ Workspaces ▪ Workflows 	<ul style="list-style-type: none"> ▪ Surveys ▪ Issue Tracking ▪ Alerts ▪ Check in/out ▪ Announcements ▪ Web parts ▪ My Sites ▪ ... and much more!
--	---

12

Browser Compatibility


- SharePoint 2010 works the same in all major web browsers.
 - Internet Explorer
 - Mozilla Firefox
 - Google Chrome
 - Opera
 - Safari



33

Browser Compatibility


- SharePoint uses a technology called Silverlight (similar to Adobe Flash) to create its dynamic, software-like environment.
 - Silverlight is not required, however, the experience will be significantly different.



34

Browser Best Practice

- While SharePoint 2010 does work in all browsers, a current version of Internet Explorer is still the best choice.



35

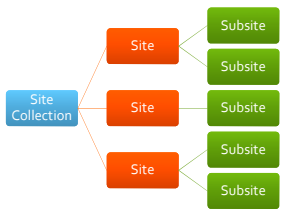
SharePoint Structure

- Structure Basics
- Structure Terms
 - Site Collection
 - Site
 - Subsite

16

Structure Basics

- A SharePoint site has a standard "tree-like" hierarchical structure.
- Three basic units
 - Site collection
 - Site
 - Subsite

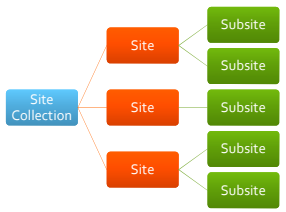


```
graph LR; SC[Site Collection] --- S1[Site]; SC --- S2[Site]; SC --- S3[Site]; S1 --- SS1[Subsite]; S1 --- SS2[Subsite]; S2 --- SS3[Subsite]; S2 --- SS4[Subsite]; S3 --- SS5[Subsite]; S3 --- SS6[Subsite];
```

17

Structure Basics

- Site designers have many tools and great flexibility in overall site design and structure.
- The organization of a site depends on the needs of the organization.

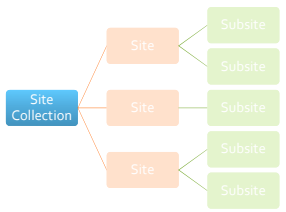


```
graph LR; SC[Site Collection] --- S1[Site]; SC --- S2[Site]; SC --- S3[Site]; S1 --- SS1[Subsite]; S1 --- SS2[Subsite]; S2 --- SS3[Subsite]; S2 --- SS4[Subsite]; S3 --- SS5[Subsite]; S3 --- SS6[Subsite];
```

18

Site Collection

- A SharePoint **Site Collection** is a top-level SharePoint site and all of its children.



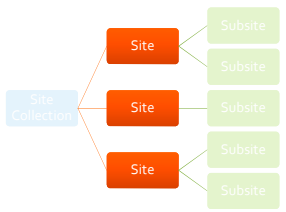
```

graph LR
    SC[Site Collection] --- S1[Site]
    SC --- S2[Site]
    SC --- S3[Site]
    S1 --- SS1[Subsite]
    S1 --- SS2[Subsite]
    S2 --- SS3[Subsite]
    S2 --- SS4[Subsite]
    S3 --- SS5[Subsite]
    S3 --- SS6[Subsite]
  
```

19

Site

- A **Site** is a collection of pages, lists, and libraries that are organized around a common purpose or goal.
 - A site for a department
 - A site for a project



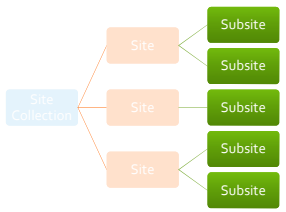
```

graph LR
    SC[Site Collection] --- S1[Site]
    SC --- S2[Site]
    SC --- S3[Site]
    S1 --- SS1[Subsite]
    S1 --- SS2[Subsite]
    S2 --- SS3[Subsite]
    S2 --- SS4[Subsite]
    S3 --- SS5[Subsite]
    S3 --- SS6[Subsite]
  
```

20

Subsite

- A **Subsite** is a site that shares the base URL of its parent site.
- Sites are just subsites of the site collection.
- Subsites can have subsites.
- Subsites can inherit from sites or be independent.



```

graph LR
    SC[Site Collection] --- S1[Site]
    SC --- S2[Site]
    SC --- S3[Site]
    S1 --- SS1[Subsite]
    S1 --- SS2[Subsite]
    S2 --- SS3[Subsite]
    S2 --- SS4[Subsite]
    S3 --- SS5[Subsite]
    S3 --- SS6[Subsite]
  
```

21


Navigating a SharePoint Site

- Navigation Basics
- Navigation Elements of the Interface

22

Navigation Basics


- There are five main user interface elements that are used to navigate a SharePoint site.
 - Title bar folder icon
 - Breadcrumb trail
 - Top link bar
 - Quick Launch menu
 - All site content



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Navigation Basics

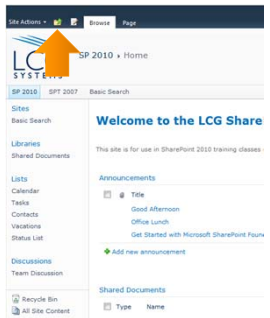
- Not all pages or sites will have all of these elements present.
 - Designers are free to design and adapt sites as they choose.
 - Your access rights (security) may prevent you from using or seeing certain elements.



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Title Bar Folder Icon

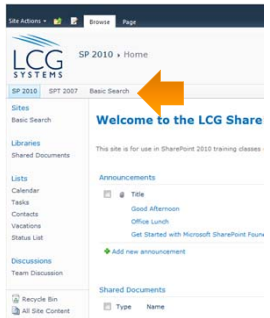
- The **Title Bar Folder Icon** displays a series of links in a stepped format that show the path of where you are.
- The links can be used to navigate up the site.



25

Top Link Bar

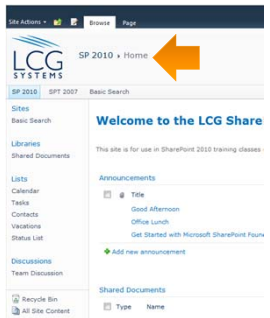
- The **Top Link Bar** displays links to other SharePoint content such as sites, subsites, lists, or libraries.
- The links may also be drop-down menus that display several links.



26

Breadcrumb Trail

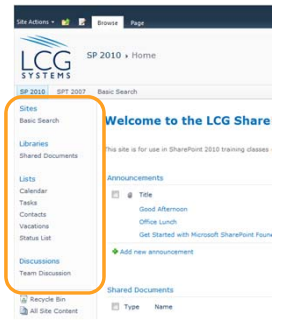
- The **Breadcrumb Trail** is a series of links found at the top of a site that displays the path of where you are.
- The links can be used to navigate up the site.



27

Quick Launch Menu

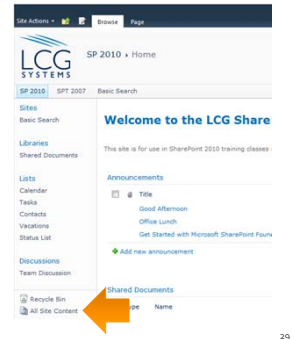
- The **Quick Launch Menu** displays links to other SharePoint content, and is usually organized into groups like Sites, Libraries, and Lists.
- Has the same basic function as the top link bar.



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All Site Content

- The **All Site Content** link displays a list of all the content found on a SharePoint site.
- The Quick Launch menu and the top link bar have limited space, so they generally display popular or frequently used links or content.



29

Navigation Reminder

- **Remember!**
 - Due to the fact that SharePoint is a highly customizable environment, some of these elements may not be present, or they may look different from the standard/basic options presented here.



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SharePoint Security

- Security Basics

31

Security Basics


- All features are controlled by security-based roles and permissions.
- What a user sees and can do is controlled by their access level or granted rights.



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Security Basics

- You may have different levels of access and rights across sites, subsites, and features.
 - For instance, you may be a site owner for one site, but on another site you may only have read access to the content.



33

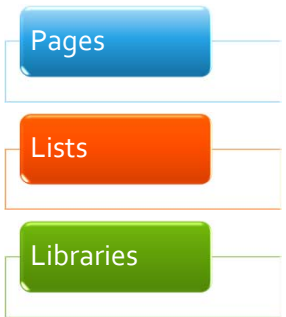
SharePoint Content Categories



34

SharePoint Content Categories

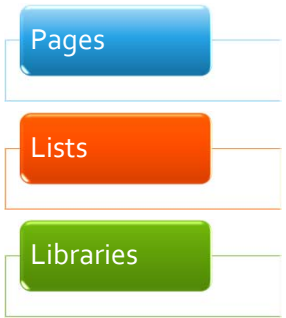
- Almost all features and items on SharePoint fit into one of these three categories.
- There are exceptions that don't fit into one of these groups, or features that fit into more than one group.



35

SharePoint Content Categories

- In the next three sections, we'll look at what each category is and what its function is on a SharePoint site.



36

Pages

- Defining Pages
- Standard Pages
- Web Part Pages

37

Defining Pages

- Pages come in two basic types.
 - Standard pages
 - Web part pages

Pages

Lists

Libraries

38

Standard Pages

- Information that doesn't change.
- Content has to be updated manually.
- Standard (old style) web pages.
- In SharePoint, these are usually wiki pages.

Page

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Maecenas sit amet urna pharetra nibh lacina tempus. Fusce sed turpis non ante pretium, pretium a sed odio. Morbi sem nunc, imperdiet porttitor lectus a, conatus a odio. Pellentesque quis mauris tellus. Ut et eros erat, a gravida urna. Sed hendrerit augue ea velit ignata aliquet. Donec sit mauris sed massa sagittis dictum. Nullam consectetur pulvinar auctor. Curabitur ac felis augue, ut laucull dolor. Vivamus posuere tempus elit et tincidunt.


In quis arcu leo. Curisque vulputate nisl feugiat magna dapibus vitae cursus nibh sociis. Nunc viverra ac eu dolor bibendum nulli. Nulla venenatis libera id pell condimentum ac volutpat velit urnare. Donec sit amet ante nec odio volutpat ullamcorper quis ac ceteris. Nulla nisi magna, ornare vel cursus quis, sagittis vel lorem. Praesent tincidunt sagittis metus, id porta libero porttitor tempus. Sed non elit ac urna fermentum porttitor eu vulputate massa. Molesti non weli libero ac laucull tellus. In phasellus malesuada neque a venenatis. Phasellus scelerisque, nulla in mattis ullamcorper, justo est aliquam eros a congue nisl purus et lorem. Nullam at justo et enim venenatis facilisis vel auctor enim. Nulla facilisi. Donec bibendum volutpat mi, eu fermentum sem volutpat et. Donec id justo at felis pharetra euismodi quis a leo. Suspendisse pretium tempor ante ac tempus.

Phasellus tincidunt turpis at elit varius quis lacina nibh imperdiet. Cras euismod mi ac enim cursus euismod. Quisque mollis vehicula placerat. Donec et metus elit. Nam dignissim urna in aliquam ultrices cononibus. In aliquet massa vitae erat vestibulum in molestie nulla imperdiet. Vivamus tristique rut quis velit lectus sed pretium massa vehicula. In posuere lacus orci, id aliquet tellus aliquam eu. Cum sociis natoque penatibus et magnis dis parturient montes, nascetur ridiculus mus.

39

Web Part Pages

- The home page of a site is usually a **web part page**.
- **Web parts** are containers or “mini-windows” that display content from other places on the site.




The diagram shows a green rectangular container labeled 'Page'. Inside, there are five blue rounded rectangular boxes, each labeled 'Web Part'. They are arranged in a grid: two in the top row, two in the middle row, and one centered in the bottom row.

40

Web Part Pages

- Since web parts get their information from other sources, the information that is displayed may change frequently and/or is updated automatically.




The diagram shows a green rectangular container labeled 'Page'. Inside, there are five blue rounded rectangular boxes, each labeled 'Web Part'. They are arranged in a grid: two in the top row, two in the middle row, and one centered in the bottom row.

41

Student Exercises

- **Exercise #1**
 - Add an announcement to the **Announcements** web part of the main site page.
- **Exercise #2**
 - **Minimize** and **Restore** a web part.



The illustration shows a pair of silver dumbbells with black weights, positioned diagonally.

42

Lists

- Defining Lists
- List Tasks and Permissions
- List Examples
- Exporting a List to Excel
- Importing from Excel
- Linking a List to Outlook

43

Defining Lists

- List information "resides" in SharePoint.
- The list data is **not** contained in a document or file.

44

Defining Lists

- Lists store data and information, not files.
- List data is organized into columns and rows like an Access table or Excel spreadsheet.

45

List Tasks and Permissions

<p>TASKS THAT CAN BE DONE BY ANYONE</p> <ul style="list-style-type: none"> ▪ Viewing item details * ▪ Sorting list data ▪ Filtering list data ▪ Changing the list view 	<p>TASKS THAT MAY REQUIRE EXTRA PERMISSIONS</p> <ul style="list-style-type: none"> ▪ Viewing item details * ▪ Adding list items ▪ Modifying list items ▪ Deleting list items ▪ Creating views ▪ Adding or modifying list columns ▪ Changing list settings
---	---

46

List Examples

- SharePoint has many built-in list templates and types.
- The starred types can be connected or linked to Outlook.
- Built-in lists can be customized as needed.

Built-In Lists
Calendars *
Contacts *
Announcements
Tasks *
Links
Discussion Boards *
Issue Tracking
Surveys

47

List Examples


- Custom lists can be created when there isn't a template that meets your needs.
 - Essentially, this is creating a list "from scratch".

Custom Lists
Grant Data
Science Data
Research Data
Web Usage Report
References List
Accomplishments
Registrations

48

Exporting a List to Excel


- List data can be exported to Excel for printing or further formatting and manipulation.
- Some list types cannot be exported to Excel.



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Exporting a List to Excel


- Once exported, a "one-way connection" is maintained between Excel and SharePoint
 - Changes to the SharePoint data can be refreshed in Excel.
 - Changes made in Excel CANNOT be refreshed or pushed to SharePoint.



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Importing from Excel


- It is possible to import an Excel spreadsheet to a SharePoint list however, **this can only be done when creating a new list.**
 - You cannot import Excel data into an existing SharePoint list.



51

Linking a List to Outlook


- Several list types can be linked to Outlook.
 - Calendar
 - Tasks
 - Contacts
 - Discussion Board
- This allows you to view and manage the list data without having to access SharePoint.



52

Linking a List to Outlook


- The link is a "two-way" connection.
 - Data can be updated in either SharePoint or Outlook and it will eventually "refresh" on both sides.



53

Student Exercises

- Exercise #1
 - Create a new entry in the Contacts list.
 - Export the list to Excel.
- Exercise #2
 - Create a new entry on the Calendar.
 - Link the Calendar to Outlook.



54

Libraries

- Defining Libraries
- Types of Libraries
- Adding Files to a Library
- File Restrictions
- Organizing a Library
- Benefits of Libraries Over E-mail
- Benefits of Libraries Over Network Drives

55

Defining Libraries

- A SharePoint Library is where files and content are stored.
 - Word documents
 - Excel spreadsheets
 - PowerPoint presentations
 - PDF files
 - Photos and pictures

Pages


Lists

Libraries

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Types of Libraries


- SharePoint has eight built-in library types.
 - Document library
 - Form library
 - Picture library
 - Report library
 - Slide library
 - Wiki Page library
 - Asset library
 - Data Connection library



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Types of Libraries


- Most common type of library is a **Document Library**.
- All other library types are based off of a document library.
- These types have specific uses or extra features to support certain file types.



58

Adding Files to a Library


- Files can be added to a library by several means.
 - Uploading
 - Created as New
 - Saved to library from Office
 - Copy/paste/drag using Windows Explorer
 - Via e-mail (if library is configured for it)



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File Restrictions

- For security reasons, some file types cannot be stored in a library.
 - Programs
 - Macros
 - Databases
- A complete list can be found online.



60


Organizing a Library

<p>BY FOLDERS</p> <ul style="list-style-type: none"> ▪ Uses a standard Windows-and-Office-like system of folders and sub-folders to organize and categorize the files in a library. 	<p>BY METADATA AND VIEWS</p> <ul style="list-style-type: none"> ▪ Uses the metadata (properties) of files to organize them into related groups or views.
---	--

61

Benefits Over E-mail


- One central place for a document.
- Eliminates multiple copies and versions.
- Security of library can help restrict the actions a user can perform on a document.



62

Benefits Over E-mail


- Reduces bandwidth usage.
- No need to send large files via e-mail.
- Reduces storage requirements in e-mail.



63

Benefits Over Network Drives


- Files have metadata.
 - Extra information and properties about a file.
 - Created and modified, by who and when.
 - Custom metadata fields can be created.
- More robust search tools and filters.



64

Benefits Over Network Drives


- Control of major and minor versions.
- Can require check-in and check-out of files.
- Workflows can perform automatic actions.
- Alerts can notify a user of changes.



65

Student Exercises

- Exercise #1
 - Create a new folder with your name.
- Exercise #2
 - Upload a file to the folder.
- Exercise #3
 - Open the file as read-only, then change to Edit mode, edit the file, and save it.



66


Office Integration

- Integration with Office
- Integration with Outlook

67

Integration with Office


- When files are opened from a library, they are saved back to the library.
- Files in SharePoint libraries can be accessed directly from the Office applications.



68

Integration with Outlook

- SharePoint tasks, calendars, and contact lists can be linked to Outlook.
 - Can view and edit in Outlook without having to open SharePoint.
- Manage your SharePoint alerts.



69

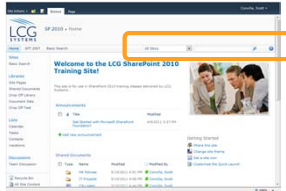
Searching SharePoint

- Search Box
- Search Results

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Search Box

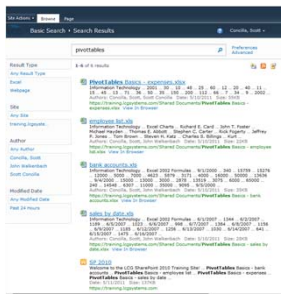
- Search box appears on most pages and sites.
- Searches search:
 - Pages
 - List items
 - People
 - File titles
 - Metadata
 - Content inside documents



71

Search Results

- Searches are fast, like Google or Bing.
- Searches can be on all sites or can be limited to specific sites.
- Advanced search capabilities and refinements make searches more powerful.



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Using Alerts

- About Alerts
- Best Practices for Alerts
- Creating a Single Item Alert
- Creating a List or Library Alert
- Managing Alerts in SharePoint
- Managing Alerts Using Outlook

73

About Alerts


- Alerts can notify you automatically via e-mail based on the conditions you set.
 - When a file is modified
 - When a file is deleted
 - When new files are added to a library
 - When new items are added to a list
 - When a page changes



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About Alerts

- Alerts can be created for almost any object in SharePoint.
 - Files
 - List items
 - Pages
 - Libraries
 - Lists
 - Folders



75

Best Practices for Alerts



Use SharePoint to create alerts

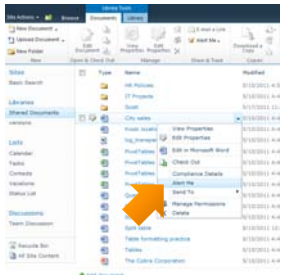


Use Outlook to manage alerts

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Creating a Single Item Alert

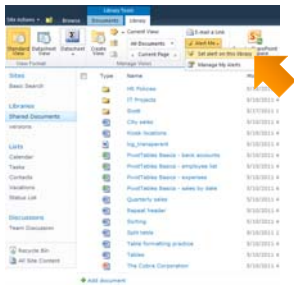
- Use this procedure to create an alert for a file, list item, or folder.
 - Click the drop-down menu of the file, list item, or folder.
 - Select **Alert Me**.
 - Select the desired alert options and click **OK**.



77

Creating a Library or List Alert


- Use this procedure to set an alert for an entire list or library.
 - On the **Library** (or **List**) tab, in the **Share & Track** group, click the **Alert Me** button and choose **Set alert on this library** (or **list**).
 - Select the desired alert options and click **OK**.



78

Managing Alerts in SharePoint


- Each SharePoint site maintains its own list of alerts for a user.
- SharePoint lacks a central interface for all of a user's alerts across all sites.



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Managing Alerts Using Outlook


- Outlook can be used to manage your SharePoint alerts.
- Outlook will display ALL alerts across ALL SharePoint sites.



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Managing Alerts Using Outlook

- Where you manage alerts in Outlook will differ depending on your version.
 - 2007
 - Inbox, Tools, Rules and Alerts, Manage Alerts
 - 2010
 - Inbox, Home, Move, Rules, Manage Rules & Alerts, Manage Alerts




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Additional Help

- Microsoft Office Online
- Recommended Books

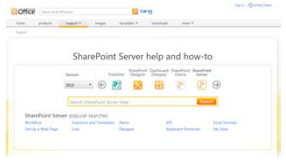
82

Microsoft Office Online



office.microsoft.com


1. Select the **Support** menu and choose **All Support**.
2. Make sure the **Version** drop-down displays **2010**.
3. Use right arrow to scroll and select the **SharePoint Server** icon.



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Recommended Books

- **SharePoint 2010 Plain & Simple**
 - J. Lightfoot and C. Beckett
 - Microsoft Press
- **The SharePoint Shepherd's Guide for End Users**
 - Robert Bogue
- **SharePoint 2010 User's Guide**
 - S. Bates and T. Smith
 - Apress
- **SharePoint Foundation 2010**
 - O. Londer and P. Conventry
 - Microsoft Press



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