

# PART 1: FOR SHAREPOINT READERS

This section of the course has been written for people who have been granted a **Read** permission level.

This permission level provides users with read-only access to a SharePoint site which means that they can view lists and libraries, and open documents and list items. They cannot make any changes to the content.

In this part of the course you will:

- ✓ be introduced to SharePoint 2010
- ✓ learn how to work with documents and list items
- ✓ learn how to work with views in lists and libraries.



## CHAPTER 1

## InFocus

WPL\_SP001

# GETTING TO KNOW SHAREPOINT 2010

Microsoft SharePoint 2010 is a business collaboration platform that allows people to build websites. But unlike typical internet websites, these sites make use of special features such as list and libraries that make it easier for people to work collaboratively.

**In this session you will:**

- ✓ gain an understanding of **SharePoint**
- ✓ gain a brief understanding of user accounts
- ✓ learn how to start **SharePoint**
- ✓ gain an understanding of the core elements of a **SharePoint** site
- ✓ learn how to navigate a **SharePoint** site
- ✓ gain an understanding of **SharePoint** sites
- ✓ gain an understanding of lists in **SharePoint**
- ✓ gain an understanding of libraries in **SharePoint**
- ✓ gain an understanding of views in **SharePoint**
- ✓ learn how to use the ribbon in **SharePoint**
- ✓ learn how to check the regional settings.

# WHAT IS SHAREPOINT?

Unlike applications such as Word or Excel, Microsoft SharePoint is not an application that you install on your computer. It is a network-based product that is installed on your company's

servers. In very simple terms, SharePoint is a tool that allows people to create websites to store, access and share content for a variety of business needs.

## What Is SharePoint Used For?

SharePoint has an enormous number of features and components that can be turned on and off by the administrator as desired. As a result of this, SharePoint is extremely flexible allowing it to be used for many different business purposes. Examples of some common usages include:

- SharePoint is commonly used to improve collaboration among teams of people in organisations, such as in the Finance Division or HR. To do this, you create SharePoint **team sites**. A team site is a website in which members can upload and share documents, assign tasks, view team events and meetings on a shared calendar, and more.
- SharePoint provides an organisation with a place to store all of its content. Rather than saving documents on multiple shared network drives, or on personal drives and then people having to email them back and forth, it's easier to place it all in one centrally-managed repository. Using the security options in SharePoint, sensitive content can be placed in areas where it can be monitored and accessed by a limited number of people, while other content can be placed in areas where everyone has total access to it.
- In many larger organisations, SharePoint is often used as a corporate portal or intranet. A corporate portal connects the individual SharePoint sites within the organisation and allows access to information and business applications. For example, staff can download forms, read the latest company news, perform company-wide searches for documents, and more.

## What Do SharePoint Sites Look Like?

It is almost safe to say that no two SharePoint sites will look or be the same – and this is because of choices made during the building of a of SharePoint site and because the sites are accessed using different web browsers, such as Internet Explorer, Firefox, Chrome and so on.

- **Permissions** – If you have been assigned the **Full Control** permission level, you have access to the full range of options to manage the site. If you have been assigned the **Contribute** permission level, you will have access to fewer options. If you have been assigned the **Read** permission level, you can only read content but not change it. Note that permissions are flexible and your organisation may create their own permission settings.
- **Customisation** – Your organisation may choose to customise SharePoint. For example, it may apply branding to a site, customise site navigation, remove the ribbon functionality, and more. SharePoint is highly flexible.
- **SharePoint Version** – SharePoint is available in two versions. **SharePoint Foundation** is the underlying technology for all SharePoint sites and it is installed on Windows-based servers. Although Foundation provides a great deal of functionality, most larger organisations will install **SharePoint Server** (and there are two editions of this product – **Standard** and **Enterprise** – each adding more features) to gain additional features and capabilities from those provided by the underlying Foundation.  
For example, Foundation is ideal for building collaboration sites – sites that enable groups of people to upload and download documents, assign tasks, share events, and use workflows – but it doesn't have enough features to build a corporate portal or provide a corporate-wide search facility. You need SharePoint Server for these features.

So as you are working your way through this course, be aware that your SharePoint site may look totally different to our samples and that you may or may not have access to the features to which we refer.

# COURSE USER ACCOUNTS

This course has been designed (and separated accordingly) with three user groups in mind: readers, contributors and developers. These user groups have access to different SharePoint

features, based on their user permissions. Here we describe the permissions for the three user accounts and explain how to use your SharePoint site using these different accounts.

## User Account Basics

Before you could start this course, the course instructor had some simple setting up to do.

The instructor built the SharePoint site that you will be using during this course and populated it with some very basic content. The instructor then granted various user accounts access to the SharePoint site, where each account belongs to one of the three permission groups shown below.

- Accounts with **Read** permissions (users can look at the content, but can't change it)
- Accounts with **Contribute** permissions (users can add documents, tasks, and so on)
- Accounts with **Full Control** permissions (users can build sub-sites, determine who can use the site, and much more)

Note: See the chapter called **Managing Security** later in this course for more details about permission levels and managing SharePoint security.

## Logging Into The SharePoint Site

At the start of each chapter in this course, you will be instructed to log into the SharePoint site as a user with a particular permission level – for example, you must log in as a user with **Read** permissions when working through each chapter in Part 1 of this course. Use the following procedure to log into the SharePoint site.

1. Log onto your computer using the user ID that has the required permissions in the SharePoint site for the current exercise

*For example, you must log on using an account with Read permissions for the chapters in Part 1 of this course. Your course instructor will tell you which user to log in as...*

2. Open the browser and type the URL to the course site

*A team site will open in the browser window and you will be logged in with the appropriate permissions for the chapter...*

3. When you need to use an account with a different permission level – for example, you must log in as a user with Full Control permissions for the first chapter in Part 2 (Preparing Your Training Site), you must close the browser, choose to switch users and then log onto your computer using the new account

*This ensures that when you open the SharePoint site in the browser, you will be signed in with the appropriate permissions for the exercise*

While you can log in as a different user from within SharePoint (by clicking on your name at the right end of the ribbon and selecting **Sign in as Different User**), it is best not to do this during the course because although the exercises will work correctly in most cases, there are some situations where they won't. Therefore, you should follow the above procedure when you need to switch to a different user.

# STARTING SHAREPOINT

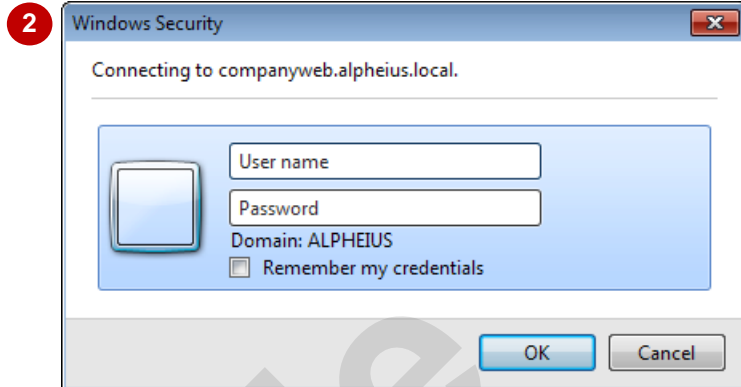
To access a SharePoint site, you must use an internet browser application. This is because SharePoint is a web-based application that uses specialised websites to gather, organise and

present the information that you can access. You must know the location of the site – if you don't, ask your administrator for the link to the specific site.

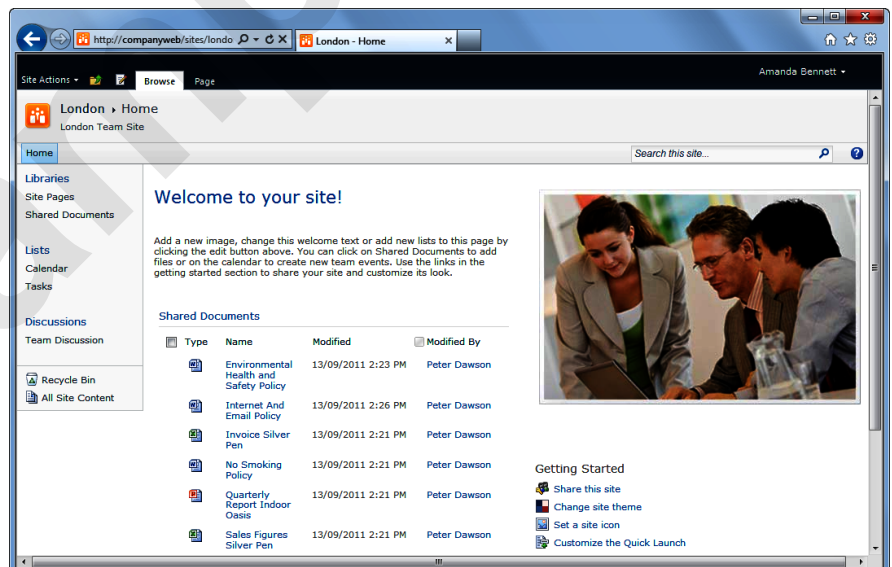
## Try This Yourself:

*Before starting this exercise log onto your computer using the account specified by your instructor (you will need **Read** permissions for this exercise)...*

- 1 Open an internet browser  
*Here we're using Internet Explorer but you can use other browsers, such as Firefox. Before you can open a SharePoint site, you will need to get the link to the team site from your course instructor...*
- 2 Type the link to the site in the **URL** box near the top of the browser window and press **Enter**  
*Depending on the setup of the site, you might be prompted for a password...*
- 3 If the **Windows Security** dialog box appears, type the **User name** and **Password**, and then click on **[OK]**  
*A SharePoint team site will display. Your site may look different to our sample as it depends on the way the site manager has set up the site*



*If you don't have access to a particular SharePoint site, SharePoint will display an Access Denied page informing you of this. If this occurs, you will need to contact the site manager and request that they grant you permission to access the site.*



- 3 The URL to the site in our sample here is <http://companyweb/sites/london>

## For Your Reference...

To **access** a **SharePoint website**:

1. Open an internet browser
2. Type the link to the site in the **URL** box
3. Press **Enter**
4. Type the **User name** and **Password** and click on **[OK]** if prompted

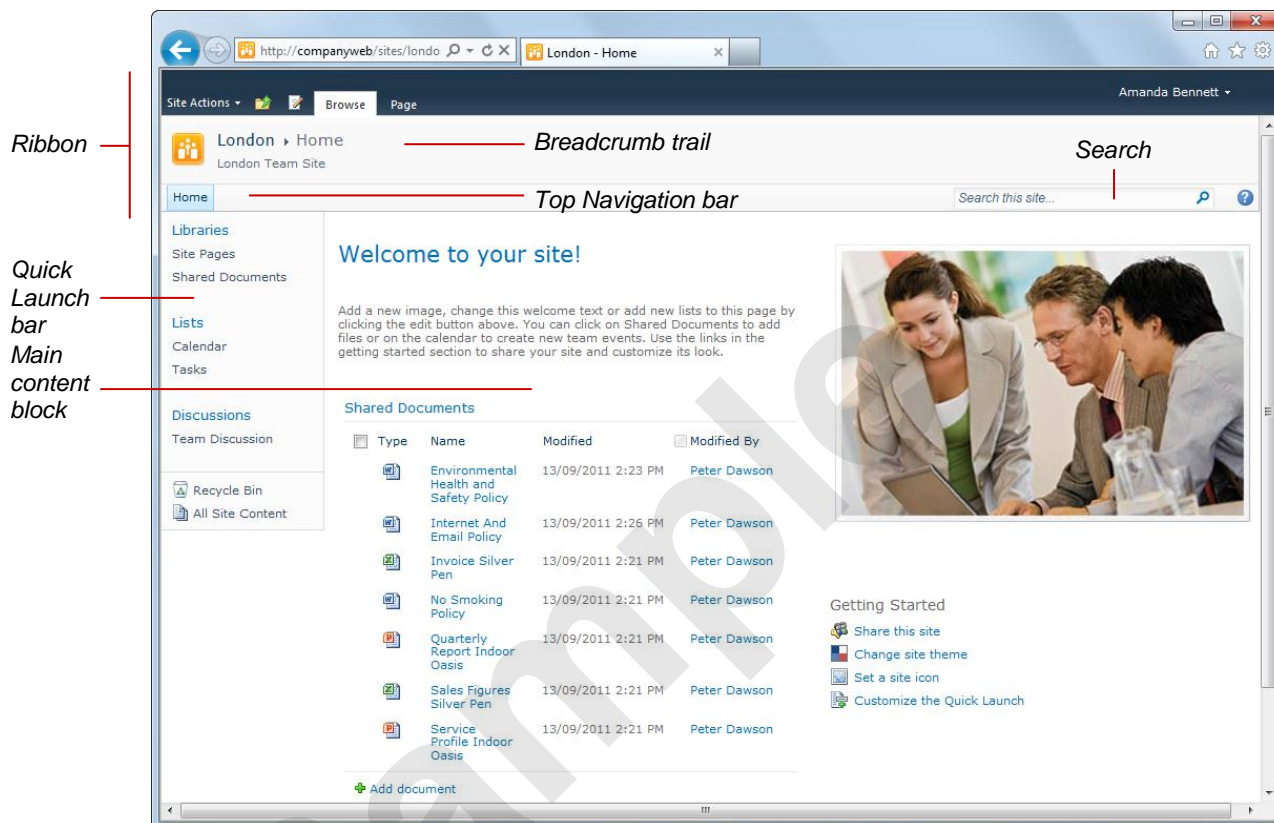
## Handy to Know...

- If you are in a SharePoint site using someone else's PC and login, you can log in as yourself. To do this, click on the name to the right of the ribbon to display a menu, select **Sign in as Different User** and sign in as described above. When you're finished, select **Sign Out** from the same menu.

# CORE ELEMENTS OF A SHAREPOINT SITE

All SharePoint sites are created from a template that best suits a particular business purpose. But regardless of which template is used, all sites tend to comprise the same basic elements. Here

we look at one of the most commonly-used websites in SharePoint – the team site – to describe the core elements. Once you know how to use a team site, you can use any SharePoint site.




## Ribbon

The ribbon organises SharePoint's options into two types of tabs. Common actions for the tasks you do are grouped together and placed on tabs that appear as you move through your site (such as the **Browse** tab above). **Contextual tabs** appear when you perform specific actions, offering only commands that are relevant to what you're doing (such as the **Page** tab above).

When the **Browse** tab is selected in the ribbon (as above), a **breadcrumb trail** showing where you are in the website appears below the tabs. For instance, the **Home** page of the **Alpheius London** website is currently displayed in the above example. You can also use this breadcrumb trail for navigating the site as all components of it, except for the last one, are clickable. E.g., if you had clicked on a link in the Quick Launch bar, you could click on **Alpheius London** in the breadcrumb trail to quickly redisplay the **Home** page. Alternatively, you could also click on **[Home]** in the **Top Navigation bar**. (Note, if this site had any sub-sites, links to these sub-sites would appear to the right of **[Home]** in the Top Navigation bar.

The **Site Actions** menu appears to the left of the ribbon. This menu may appear and the options that it offers (such as **Edit Sites** or **View All Site Content**) will depend on the permission level that you've been granted (e.g., **owners** can create and edit sites while **readers** can only view content) and the version of SharePoint that you're using.

The **Navigate Up** tool  shows where the current page fits into the overall hierarchy of the site. You can also click on the options shown in its drop-down menu to navigate your site.

## Quick Launch bar

The quick launch bar provides clickable links to various SharePoint elements, including libraries (e.g., **Shared Documents**), lists (e.g., **Calendar**), **Recycle Bin** and **All Site Content** (which shows all content in the site including lists and libraries that aren't displayed in the Quick Launch bar).

## Search

You can type words into **Search this site**, press **[Enter]** and SharePoint will display the results in the **Search Results** page.


## Main content block

It is intended that you edit the content on the page, including the text, stock image, formatting and so on. SharePoint even provides hints with the **Getting Started** information.



# NAVIGATING A SHAREPOINT SITE

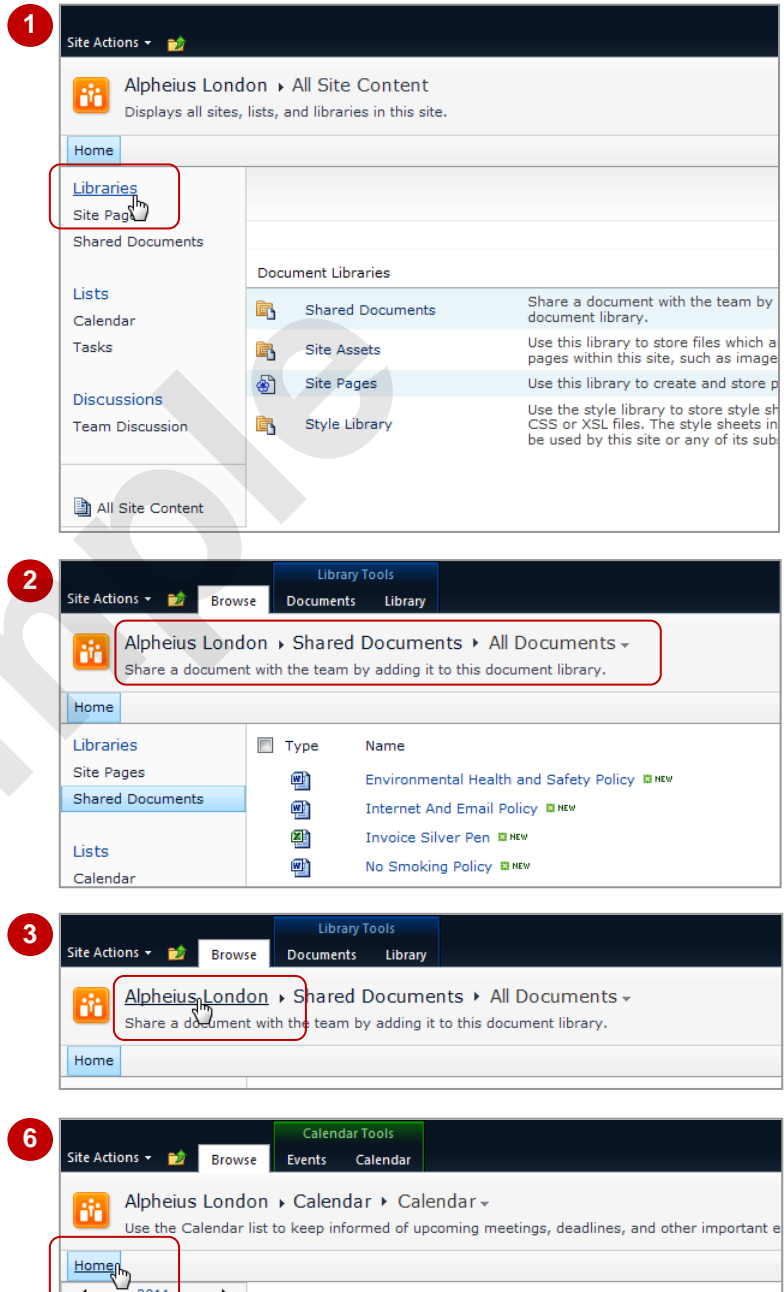
SharePoint provides four features for navigating a site, but whether you have access to all of these will depend on your site. The **Browse** tab of the ribbon includes three navigational aids: the

**breadcrumb trail**, **top navigation bar** and the **Navigate Up** tool . Often, the **quick launch bar** also appears to the left of the page.

## Try This Yourself:


Continue using the previous site with this exercise...

- 1 Click on **Libraries** in the Quick Launch bar to see a list of all libraries in the team site  
*Document libraries are where you store files in SharePoint...*
- 2 Click on **Shared Documents** under **Document Libraries** in the content block to open this library – some files have been uploaded to this library  
*Our breadcrumb trail shows that we're looking at the All Shared Documents view of the Shared Documents library in the Alpheius London site. The breadcrumb can also be used for navigation...*
- 3 Click on the first link in the breadcrumb trail (**Alpheius London** in our case) to display the Home page again
- 4 Click on **All Site Content** in the Quick Launch bar to see links to everything in the site  
*This is a very handy link as not everything may be listed in the Quick Launch bar...*
- 5 Click on **Calendar** under **Lists** in the content block to open the **Calendar**
- 6 Click on **[Home]** in the Top Navigation bar to display the Home page again




## For Your Reference...

To **navigate a site**:

- Click on a link in the Quick Launch bar, such as a library or **All Site Content**
- Click on the **Browse** tab in the ribbon and click on **Navigate Up** , a link in the breadcrumb trail, or on a link in the Top Navigation bar to navigate to a sub-site

## Handy to Know...

- You can click on **Navigate Up**  in the ribbon to see where the current page fits in the site, and then click on a page in the drop-down menu to display it. This is particularly useful for sites with lots of sub-sites.
- You can use the browser's tools, **Forward** and **Back**, to move between visited pages.



# SHAREPOINT SITES

A SharePoint **site** is a specialised website used to gather, organise and present the information you put into SharePoint. Sites can serve a general purpose – e.g., a team site may store

documents, schedules and other information that team members refer to frequently. Other sites may be quite specific in their purpose – e.g., keeping track of a meeting or hosting a blog.

## Sites

SharePoint sites are different in structure to typical internet websites. Internet websites comprise linked pages, while SharePoint sites comprise pages that act as repositories for information and content. SharePoint sites store this information and content in special containers known as **lists** and **document libraries** (you'll learn about these SharePoint elements later in this chapter).

SharePoint lets you create many types of sites (as long as you have the correct permission) based on its various templates. Examples of some of the common sites used for collaboration include:

- **Team Site** – only the members of the team can log onto this private website and use it to communicate, upload documents, keep track of to-dos, milestones, meetings, discussions and more
- **Blank Site** – includes the basic structure of a typical SharePoint site such as the ribbon, quick launch bar and so on, but SharePoint does not insert any default lists or libraries – you add these as needed
- **Document Workspace** – lets many people work on a single document e.g., different people may be responsible for separate components of an annual report and they may work in different areas within an organisation (note that **workspace** is another name for a SharePoint **site** – technically they're identical)
- **Meeting Workspace** – these are very simple sites that let you plan, organise and record the outcome of meetings

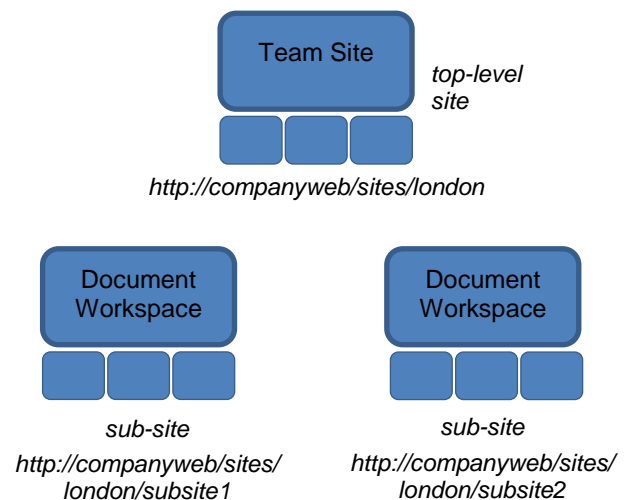
The structure of the SharePoint sites created for users in an organisation will vary enormously. With that said, however, most larger companies will create team sites for their various departments and teams.

## Site Collections

Every SharePoint site is part of a **site collection**. A site collection is, just as it sounds, a collection of related sites (as shown to the right). The site at the top of a site collection is known as the top-level or root site – this is the site that was created first – and could be a team site, blank site or some other type of site. If you then create a site from within the top-level site, such as a document workspace, this new site will be known as a sub-site or child site.

The sub-sites and top-level site in a site collection are linked (as you can see by their URLs to the right) which means that site visitors can navigate between the sites. The sites may also share attributes such as security, but they will contain different content such as pages, lists and libraries.

Although you can create as many sub-sites as desired in the one site collection, it's better not to; otherwise, site navigation and management may become very difficult. Instead, if you are part of a large organisation, your site collection will be probably just one of many site collections which form part of a larger corporate portal site – commonly, large organisations will create a site collection per department (e.g., Operations, Sales).



# LISTS

SharePoint is most commonly used to store information and this information is stored on sites in containers known as **lists**. Lists are like simple databases or spreadsheets making them ideal for

storing, presenting and managing information. For example, you can track team events, meetings and appointments in a **Calendar list** or host discussions in a **Team Discussion list**.

## Structure Of Lists

A list comprises rows of data where each row is an individual record. Each row of data is known as a **list item**. A list also comprises one or more **columns** (these are also known as fields or properties) and it is into these columns that the data is stored for a list item.

For example, look at a sample of a **Tasks list** below. Tasks lists can be created to track work assignments for your team members. This list has four tasks (list items), and each task has data in most of the eight columns (such as **Title**, **Assigned To** and **Status**).

Column

List item

Type	Title	Assigned To	Status	Priority	Due Date	% Complete	Predecessors
Document	Write Leave Policy first draft <small>NEW</small>	Amanda Bennett	In Progress	(2) Normal	25/10/2011	20 %	
Document	Review Leave Policy <small>NEW</small>	Peter Dawson	Not Started	(2) Normal			Write Leave Policy first draft
Document	Write Leave Policy final draft <small>NEW</small>	Amanda Bennett	Not Started	(2) Normal			Review Leave Policy
Document	Review Leave Policy final draft <small>NEW</small>	Peter Dawson	Not Started	(2) Normal			Write Leave Policy final draft

When you create a new site, SharePoint will add various lists and document libraries by default, depending on which template you choose. For example, when you create a new **team site**, SharePoint will automatically add five lists to your site: **Announcements** (for news and other information), **Calendar** (for recording team meetings and events), **Links** (for useful links e.g., to clients), **Tasks** (for assigning tasks to team members) and **Team Discussion** (a discussion board).

You can choose to use any or all of these lists, or you could insert other lists available in SharePoint. You can also modify default lists (by adding and deleting columns) and even create new custom lists to display information as desired.

## Accessing Lists

You can access lists in your website by clicking on their links in the Quick Launch bar (as we have done in the above example of our team site) or in the **All Site Content** page if their links aren't included in the Quick Launch bar. You can also access the contents of a list on a page in your site by inserting a special SharePoint building block called a **web part** that points to the list.

For example, if you have created a custom Vendors Contact list in your site, you may decide that this information should appear on your site's home page as all team members use this information regularly. You can do this by editing the home page and inserting a **web part** that displays the data in this list. (Note that web parts don't actually store the data, they are simply components that you can insert into pages that act like a window pointing to where the data is stored in the list.)

# LIBRARIES

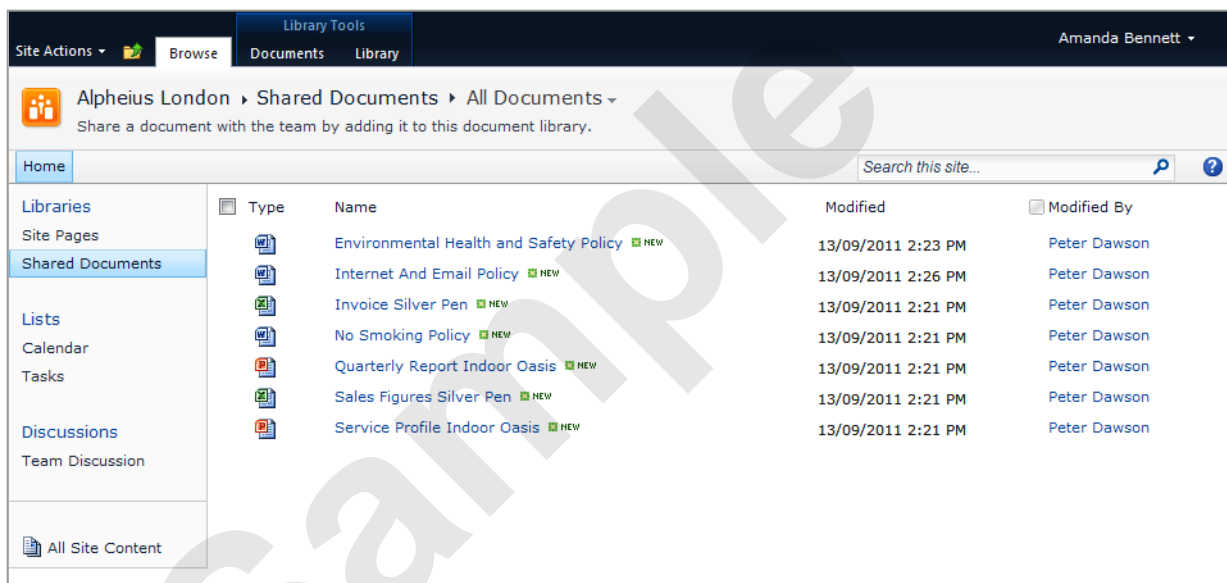
A **library** is a special type of a list where every list item is a file. Other information – such as the file type and file name – is also stored in the library. There are several different types of

libraries available in SharePoint with their main differences being in the types of files that they store.

## Document Libraries

Most people working with SharePoint will work with document libraries, such as the **Shared Documents** library in a team site (as shown below). You will find a document library in nearly every SharePoint site, and in many cases, more than one document library.

Document libraries allow you to store, work on and share documents, such as Word documents, Excel workbooks, PowerPoint presentations, Adobe PDF files, and more. To add files to a document library, you must either upload them or create new files from within SharePoint using the **New Document** tool in the library.



## Other Libraries

A **picture library** is a special type of document library that stores images. Because it stores images, a picture library provides two views that let you see your images as thumbnails or in a filmstrip.

A **slide library** is a library that enables you to upload a PowerPoint presentation, separating each slide into an individual file. This lets different people work on individual slides. You can also quickly select specific slides to re-use in another presentation from within SharePoint. Note that if you don't want to break apart a presentation into individual slides, you can upload it into a normal document library.

An **asset library** is a type of document library that is designed to store images and media files such as video and audio files.

A **form library** is a library designed for forms created using Microsoft InfoPath. Users can then open and fill in these forms from the library.

## Accessing Libraries

Just like lists, you can access libraries by clicking on their links in the Quick Launch bar or in the **All Site Content** page if their links aren't included in the Quick Launch bar. You can also access the contents of a library on a page in your site by inserting a web part that points to the library – for example, the **Shared Documents** library is included in a web part on the home page in a default team site.

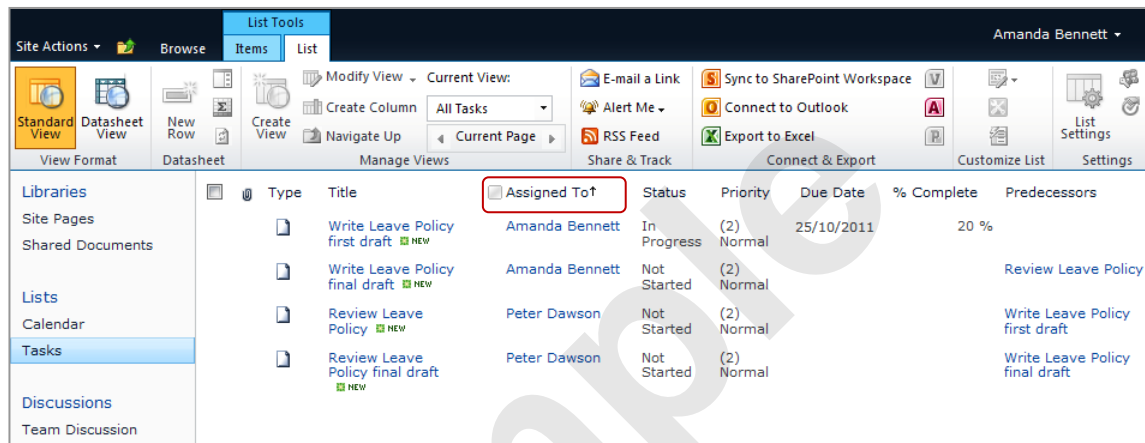
# VIEWS

Whenever you look at a list or library in SharePoint, you are looking at a **view** of that list. The list's underlying data is stored in database tables on the SharePoint server. So, rather than

seeing all data stored in a list, different views present the information by displaying specific columns and by applying various sorting, filtering, grouping and styling criteria.

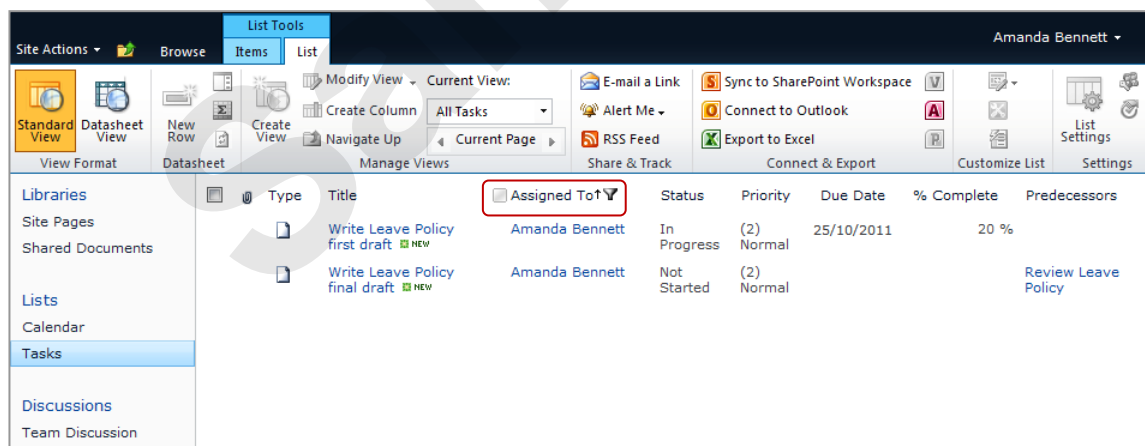
## Types Of Views

There are several types of views used in SharePoint. The default view for the majority of lists is **Standard view** which is a tabular format with column headers and the values displaying in rows. Standard view is ideal if you wish to sort the information by a specific column header or filter the information so that only specific records will display (as shown in the two examples below).



Type	Title	Assigned To	Status	Priority	Due Date	% Complete	Predecessors
Document	Write Leave Policy first draft	Amanda Bennett	In Progress	(2) Normal	25/10/2011	20 %	
Document	Write Leave Policy final draft	Amanda Bennett	Not Started	(2) Normal			Review Leave Policy
Document	Review Leave Policy	Peter Dawson	Not Started	(2) Normal			Write Leave Policy first draft
Document	Review Leave Policy final draft	Peter Dawson	Not Started	(2) Normal			Write Leave Policy final draft

The Task list above has been sorted on the column *Assigned To*. An up arrow appears to the right of the column header showing that it has been sorted in ascending order



Type	Title	Assigned To	Status	Priority	Due Date	% Complete	Predecessors
Document	Write Leave Policy first draft	Amanda Bennett	In Progress	(2) Normal	25/10/2011	20 %	
Document	Write Leave Policy final draft	Amanda Bennett	Not Started	(2) Normal			Review Leave Policy

This same list has been filtered to show only tasks assigned to Amanda Bennett. The filter (funnel) icon appears to the right of the column header indicating that a filter has been applied to this column

There are other types of views available in SharePoint.

**Datasheet view** is a special type of view that displays the underlying data in a spreadsheet format. This view is ideal if you wish to quickly add several records to a list as you can directly edit the data in the columns in this view.

**Calendar view** is a special view that formats the underlying data into a calendar. This view filters the data so that you see only the required data, such as a month's worth of calendar information, and this calendar information shows only a summary of the scheduled events (rather than all of their details). Calendar view is the default view when you access a **Calendar list**.

SharePoint provides one or more views for each list and if necessary, you can also create custom views. To change views, either click on the final option in the breadcrumb trail (**Change Views**) and select an option, or select a different view in the **Manage Views** group on the **List** tab.