Introduction and User Guide for SharePoint Collaborative Workspaces

Contents

Chapter 1: Overview

What is a collobrative Site?

This document will give potential users an overview of all the functions which can be provided for your SharePoint Collobarative site. It will also explain how these items can be customised to suit your needs.

How do I use it?

This user guide has been prepared to give users with contribute permissions guidance on the tools provided as standard on a SharePoint collborative workspace.

This document will cover briefly how to view (with read only access) content placed on a collobrative site and then go into more details on how a colloborative users can interact with the site and add and edit contents with the appropriate permissions.

How do I get it?

You should consider the features outlined in this document and define which you would find appropriate for your collaborative space.

Sites can be created for collaborative within or across university departments for **university use only.** Personal sites will not be created!

Initially site will be created for University staff but if there is a requirement to introduce external users to access the site this will be considered as part of the application for the site.

Appendix one includes some questions regarding your requirment for a colloborative site. If you can fill in these details and pass to the XXXX team for assessment the creation of your site can begin.

Chapter 2: Colloborative Site Functions

This section will outline the standard features of a collaborative site, how they can be modified. Further chapters will explain the features in more details.

Document Libraries

One or more document Libraries can be created and titled as required. Document Libraries allow users to create folder structures, upload and create new documents and provide version control

A typical SharePoint menu will include the following:

Document Libraries specific to the collaborative site. These will be available to store and view documents and media of any kind. Each document Library can be made up of documents and sub folders.

Other web ***Resources*** relating to the collaborative space can be added and made available.

News items can be added and viewed from the ***News*** list or the site home page.

Calendar appointments relating to the site can be viewed in the calendar list

Completed and Outstanding ***Tasks*** can be viewed in the task list

Discussion Boards can be viewed under the discussions Sections.

Chapter 2: Viewing Document Libraries and Lists on SharePoint

To view any content on a SharePoint Collaborative site the left hand menu (See below) can be used to navigate through all the high level content on the site.

1. To View the site:

A typical SharePoint menu will include the following:

Document Libraries specific to the collaborative site. These will be available to store and view documents and media of any kind. Each document Library can be made up of documents and sub folders.

Other web ***Resources*** relating to the collaborative space can be added and made available.

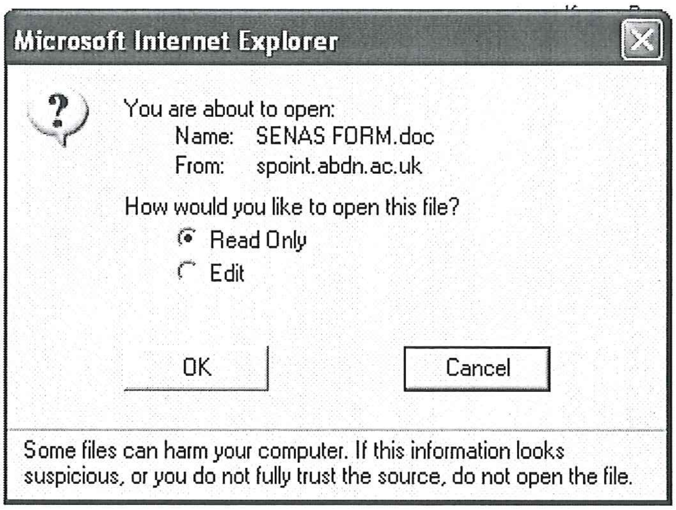
News items can be added and viewed from the ***News*** list or the site home page.

Calendar appointments relating to the site can be viewed in the calendar list

Completed and Outstanding ***Tasks*** can be viewed in the task list

Discussion Boards can be viewed under the discussions Sections.

Once you have selected what you wish to view you can do so simply by clicking on the title of the required task, discussion, News item etc and it will open. The same is also true when selecting a document to view, although collaborative users will also be asked if they want to only Read the document or check it out and edit it. This relates to using version control on the site which will be covered in the next Chapter: Document Libraries.



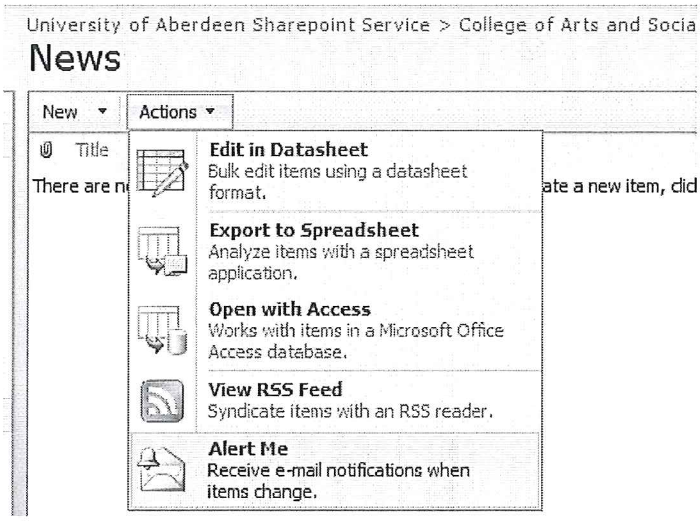
2. Getting email Alerts to changes on the site.

Users can set themselves up to recieve email alerts to any changes on the site. This can be done at the doucment library level or on an individual document level.

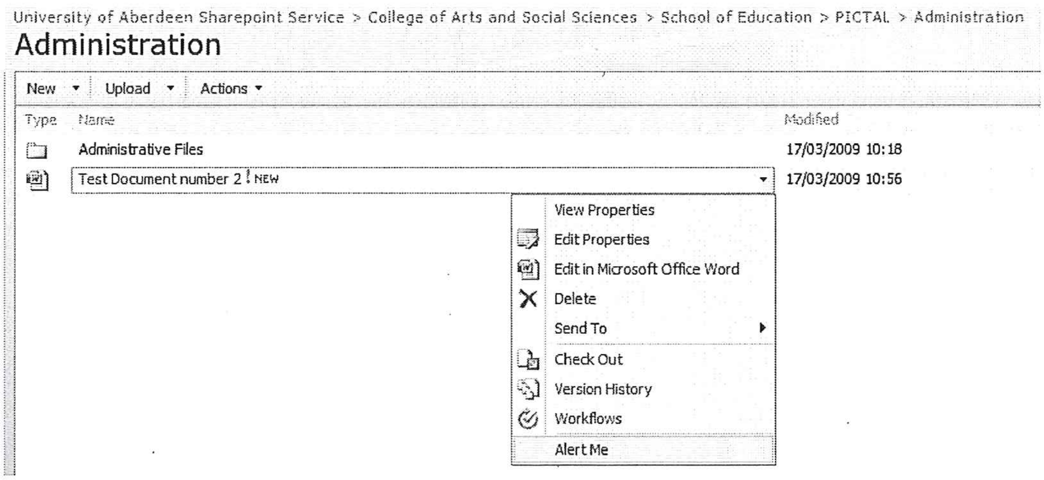
To set up an alert:

- Navigate to the document library, document, or other item you wish to be alerted about.

For whole Document Libraries or any other List item you should select 'Alert Me' from the actions toolbar at the top of the screen



For individual Items you should select 'Alert Me' from the drop down menu against that item.



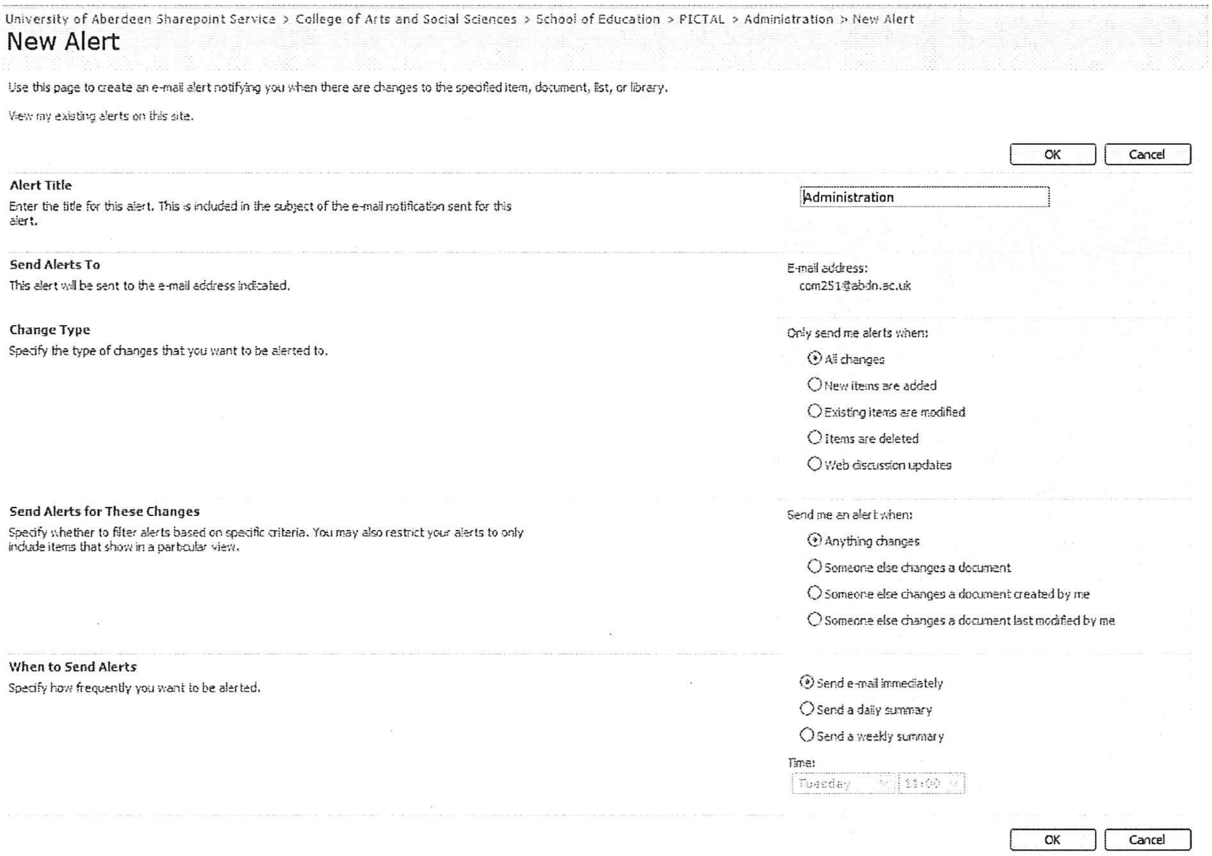
Once you select to recieve alerts you will be asked to confirm how you want these alerts to be recieved.

The options you have to consider are:

- The ***title*** of the alert – this can be decided by the user but a suggestion is always made.

- The ***Type*** of change you want alerted to (Only available when being alerted to multiple items in a list/library), options are: All Changes; New Items Added; Existing Items Modified; Items Deleted; Web Discussion Updates.
- Alerts for changes made when: Anything Changes; Someone else changes a document; Someone else changes a document Created by Me; Someone else changes a document last modified by me.
- **When** to Send Alerts: Immediately; Daily Summary; Weekly Summary.

Making your choices and clicking OK will set up the alert.

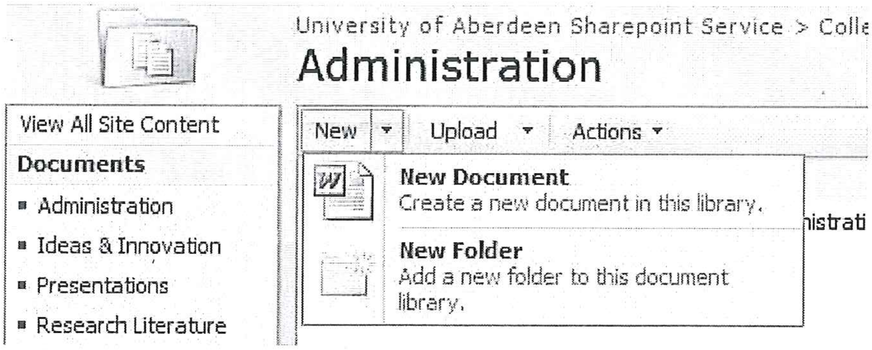


Chapter 3: Document Libraries

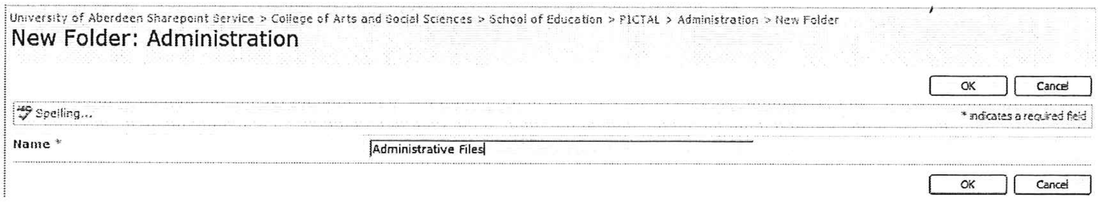
1. Creating New folders and documents

By navigating to the required document library users can add folders and documents to a library by using the 'New' and 'Upload' options available to them in the document Library.

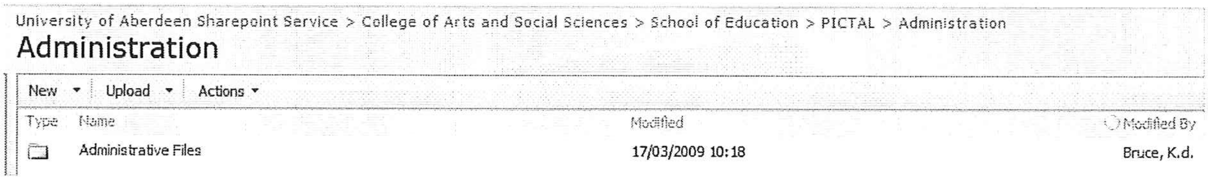
- To create a new folder or document select the 'New' drop down menu and choose either Folder or document to add.



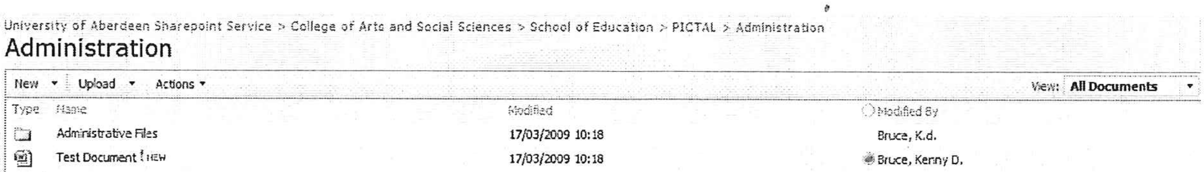
- If you choose 'New Folder', you will be prompted to enter the folder a name before clicking OK.



- The folder will then be added to the document library to be populated with documents and/or additional subfolders.



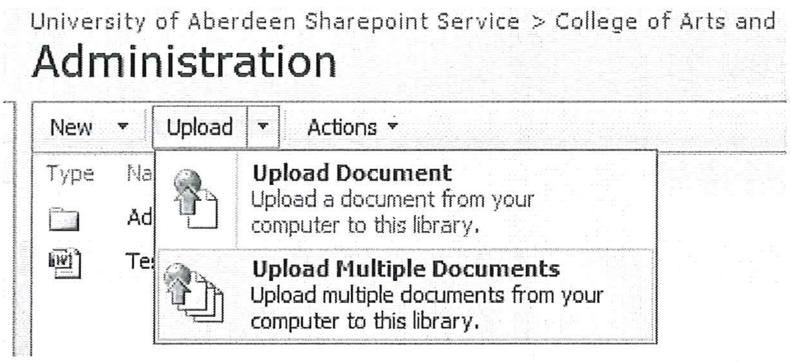
- If you choose 'New Document' you will be presented with a blank Word Document (this is the standard template although others such as excel or braded documents can be created if required). You will then be able to write in the document before saving it directly into the SharePoint folder.



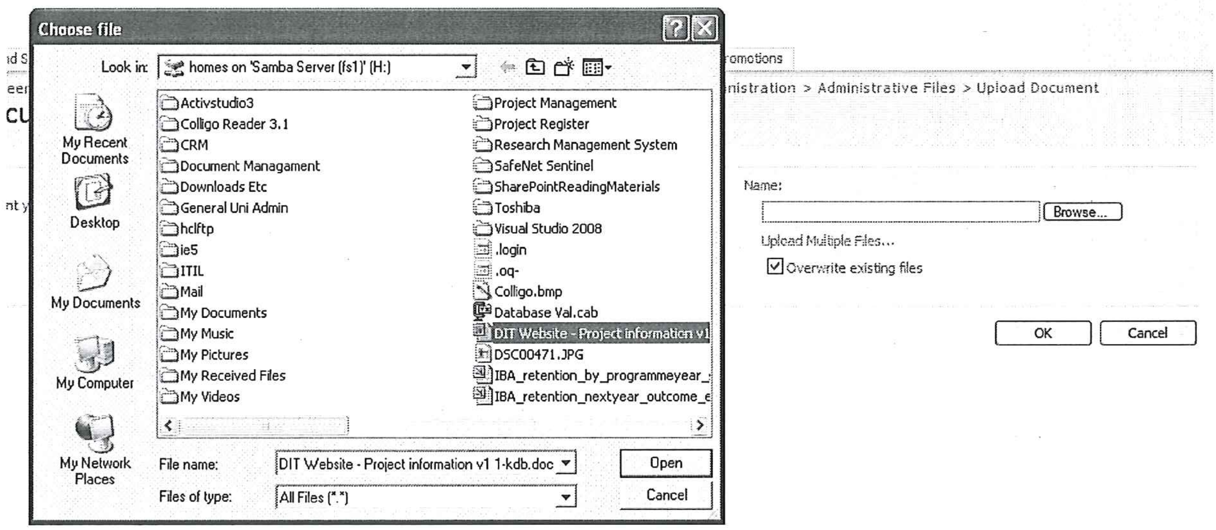
2. Uploading documents.

Users can upload single or multiple documents from an existing drive. To do this, navigate to the document library and folder within which you wish to upload the document:

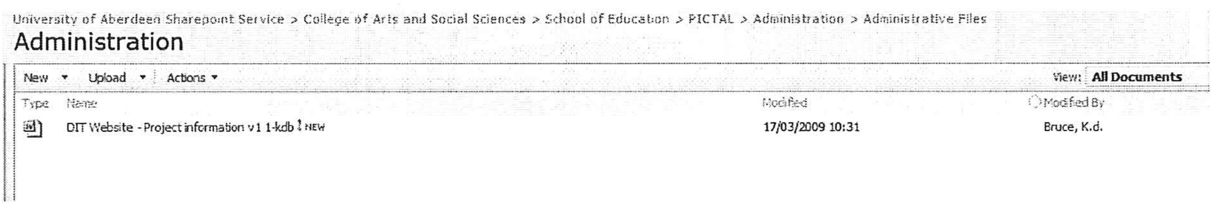
- Select the 'Upload' drop down menu and choose upload a single or multiple documents.



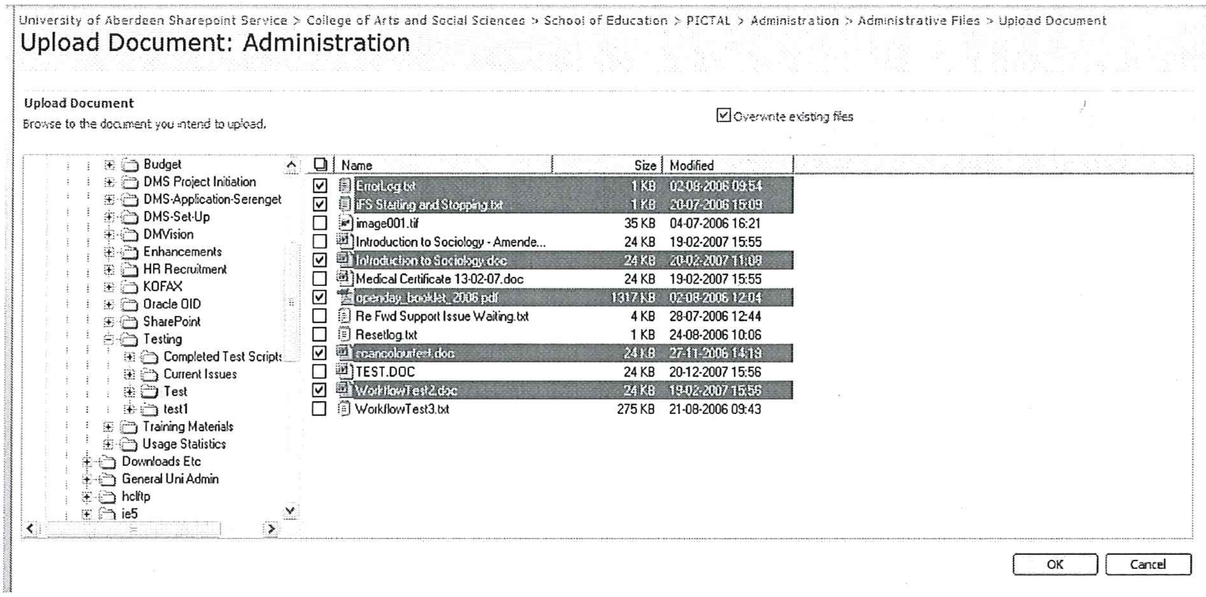
- Choosing 'Upload document' will allow you to browse you document drives to select the file you wish to upload. Similar to adding an attachment to an email.



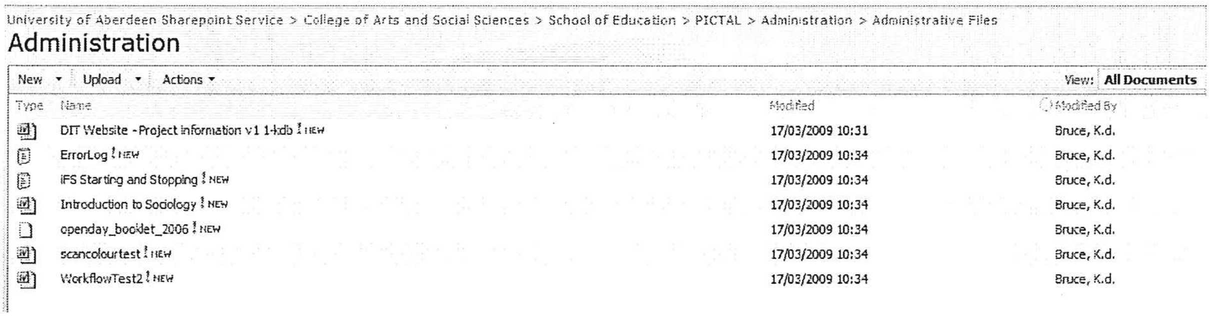
- Double clicking on the file and selecting OK will upload the document to the required folder.



- Choosing 'Upload Multiple Documents' will allow you to select a number of documents from a folder in an existing drive



- Highlighting all required documents and clicking OK will upload the documents to the required folder.

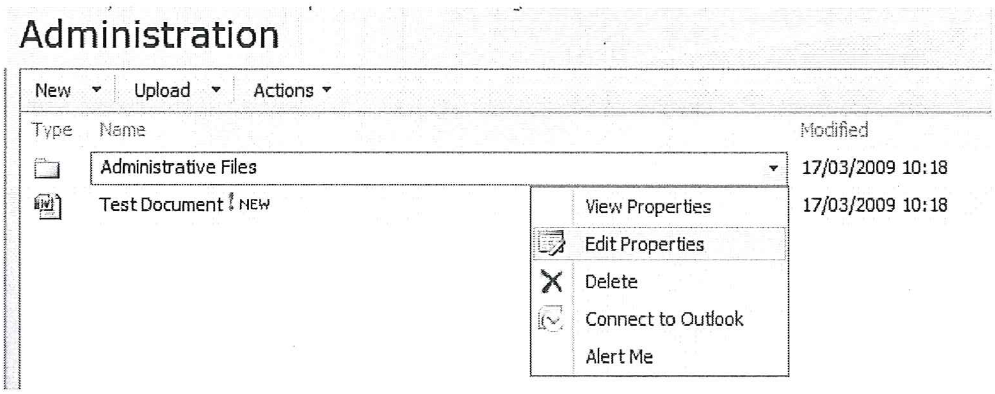


3. Editing document and folder properties

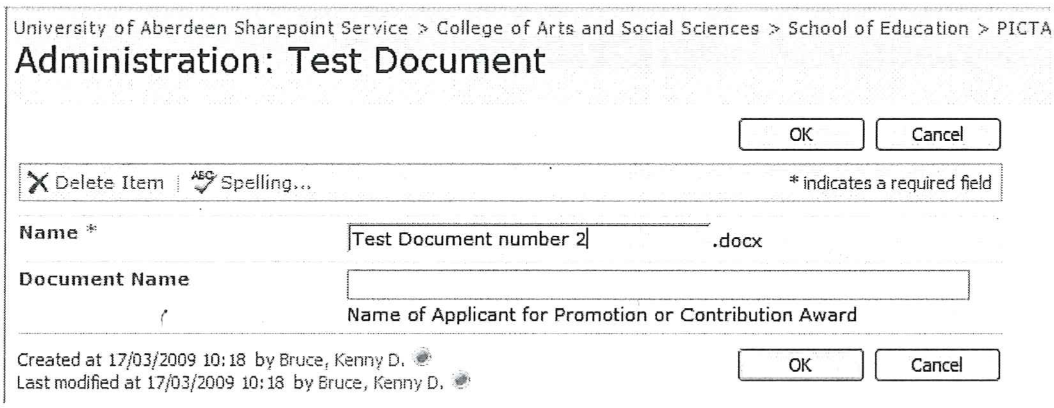
Once you have created documents and folders in a document library you have the ability to edit the properties of a document or a folder.

To do this:

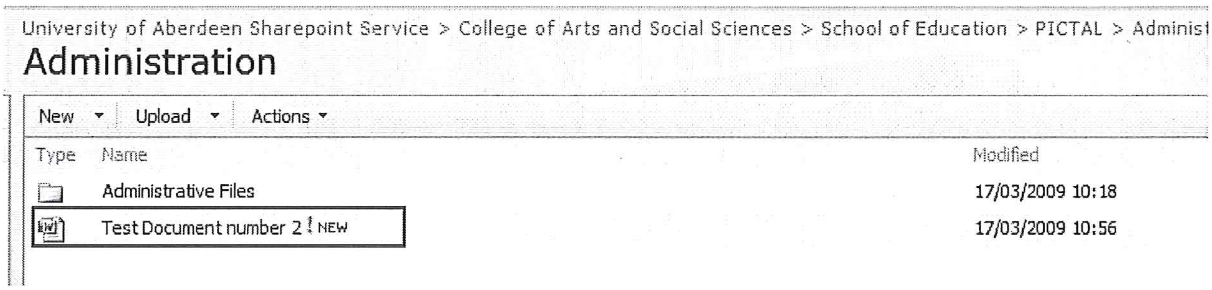
- Select the required document or folder and choose 'Edit Properties' from the drop down menu available on the item



- You can then choose to change the name of the document or folder as needed.

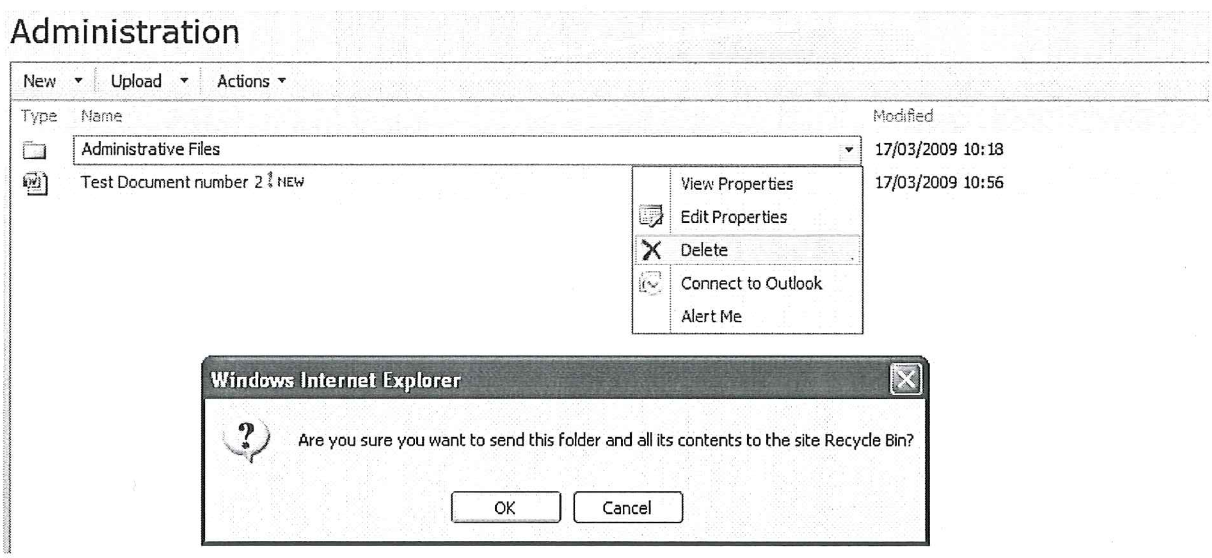


- Changing the name and selecting 'OK' will make the required changes to the item.



4. Deleting documents or folders

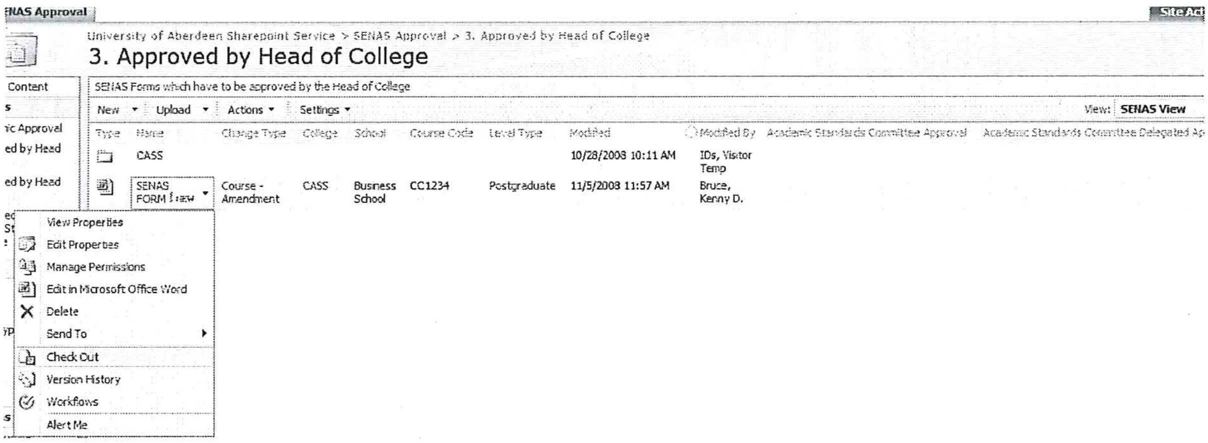
Documents can be deleted by selecting the 'Delete' option on any folder or document and selecting OK. You will be given a warning and asked to confirm the action.



5. Creating new versions of documents and viewing version history

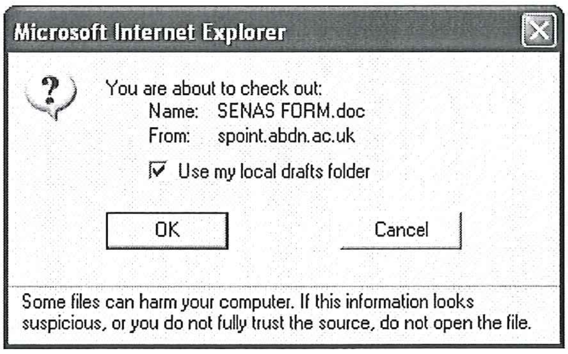
Users with the appropriate permissions can edit the content of documents. Moreover, by checking out the documents and making comments on the changes made a version history of changes can be kept. To edit a document:

- Navigate to file you wish to amend and select 'Check Out' from the drop down menu against the document.

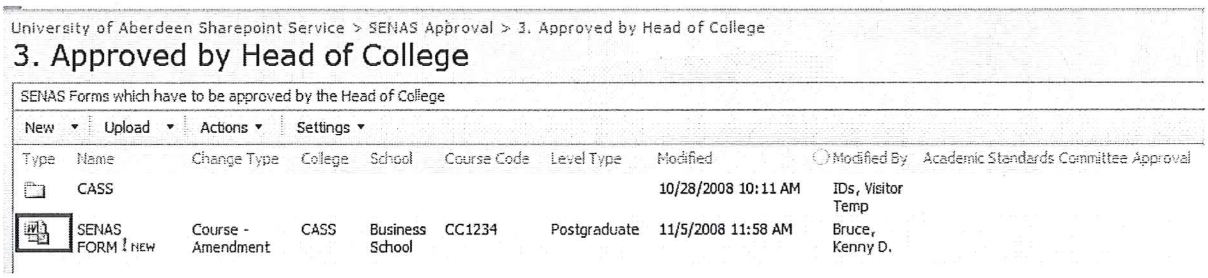


'Check Out' document

- Then select the OK when asked to confirm. See Below.

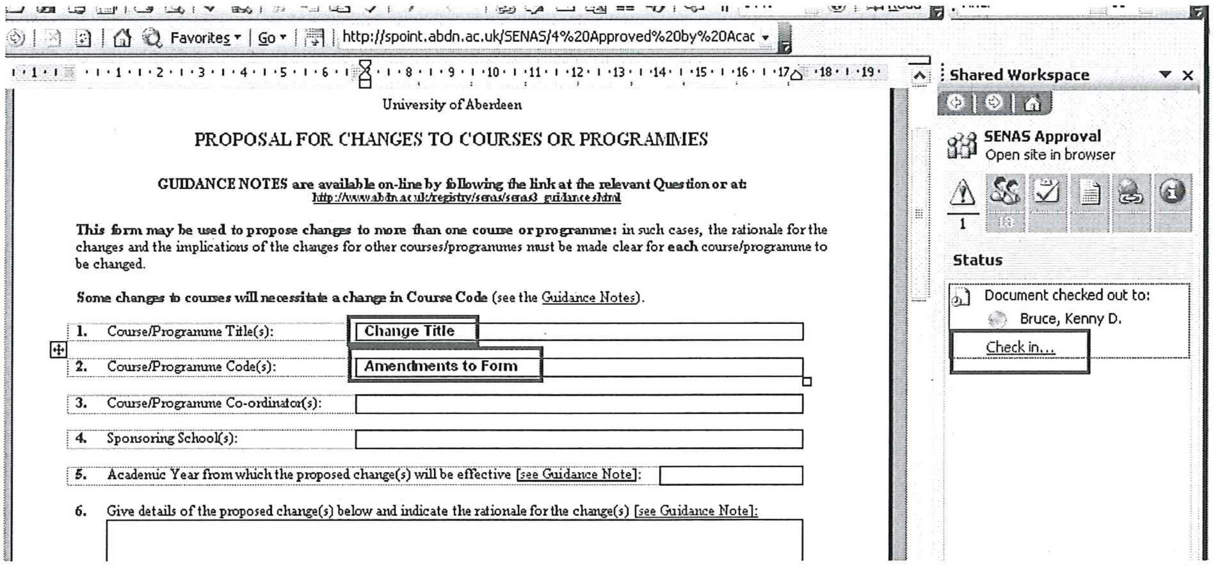


- Checked out documents are marked as seen below and will allow other users to view the current document, but will not allow anyone else to make changes.



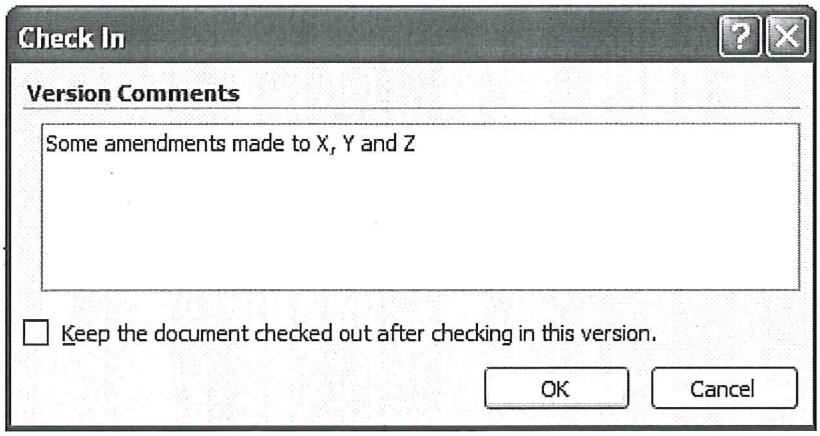
'Checked Out' document

- To open the document for editing click the title of document it will be opened.
- Make any changes to the document as required and then select 'Check In' to confirm you are finished making changes. See below.



Amending and 'Checking In' a document

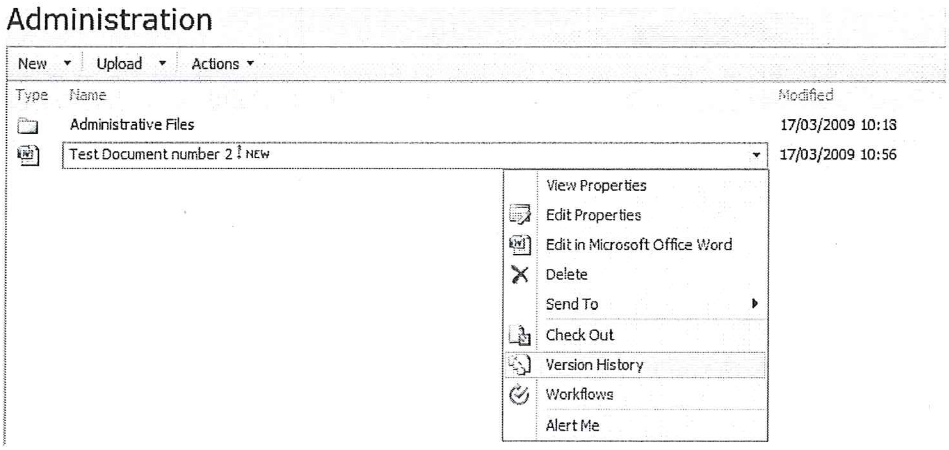
- You will be prompted to add any comments on the changes you have been made. These can be entered in the Version Comments box.
- Select OK to confirm changes and check the document back in.



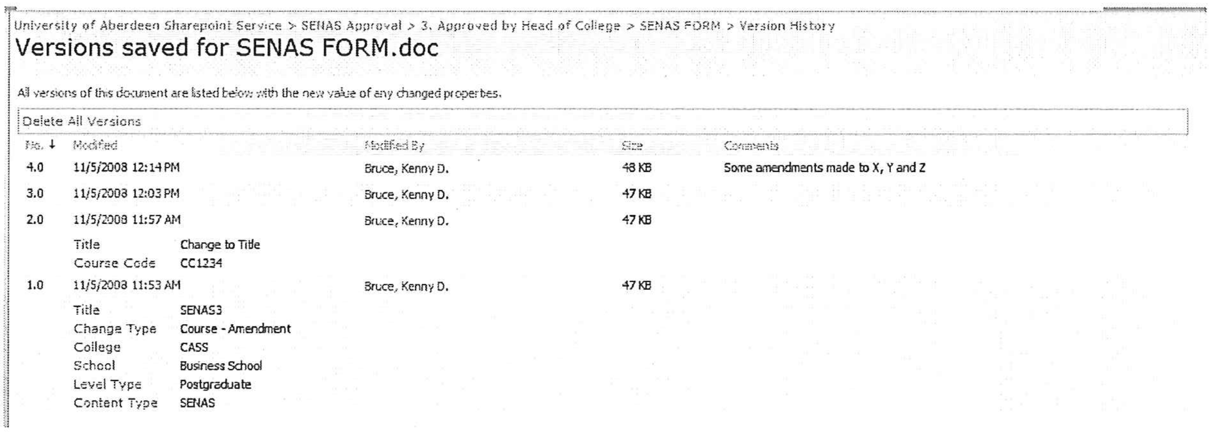
Version Comments and Confirm

- The revised document is now available for others to view and the changes and any comments will be logged in the documents version history.

To View the Version History select 'Version History' drop-down menu next to the document.



This will allow the viewer to see all versions of the document (By selecting the date). It will also show any comments made when documents have been checked in and show any changes to the documents properties.

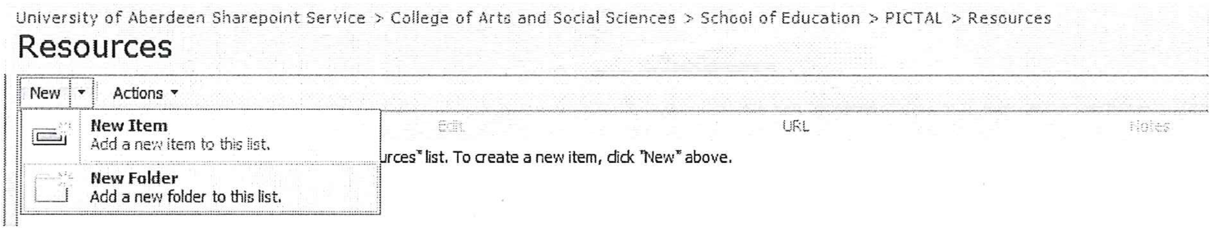


Version History View

Chapter 4: Resources

Resource Lists contain links to web addresses which contain information that is considered of interest to the SharePoint Site audience. This could relate to external resources or other areas of the SharePoint system.

Resource Lists can be created within a folder structure in the same way as document libraries and folders can be cretaed by selecting the ‘New’ then ‘New Folder’ from the drop-down menu using the same process.



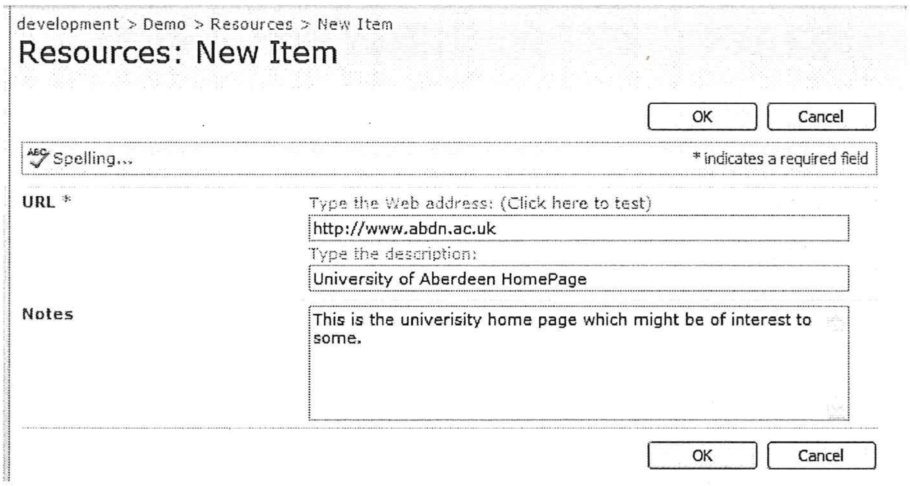
To add a new resource Item you can:

- Select ‘New Item’ from the ‘New’ drop down menu.
- Enter the details required

URL: This is the web address required to access the site. You can use the (Click here to test) function to ensure the details have been entered correctly.

Description: This is how the link will be displayed, rather than a potentially meaningless URL

Notes: Any details that might be of interest to the audience can be added here.



- Clicking OK will add the link to the site.

Resources

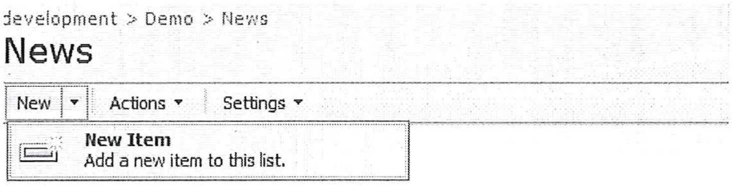
New ▾ Actions ▾ Settings ▾

Type	Edit	URL	Notes
		Proposal Doc	
		Welcome to Google	Notes
		Aberdeen Uni Site	Note
		Uni Website	View this
		Link to Policy	Please review of interest.
		University of Aberdeen HomePage	This is the univerisity home page which might be of interest to some.

Chapter 5: News Items

News Items can be used to highlight items of interest to the SharePoint Site Audience. This could relate to evnts or updates and can also contain attachements.

News Items can be by selecting the 'New' then 'New Item' from the drop-down menu in the News List.



To add a new resurce Item you can:

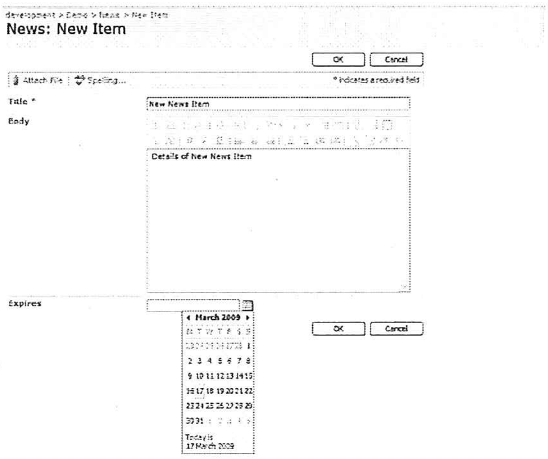
- Select 'New Item' from the 'New' drop down menu.
- Enter the details required

Title: This is the title of the News Item

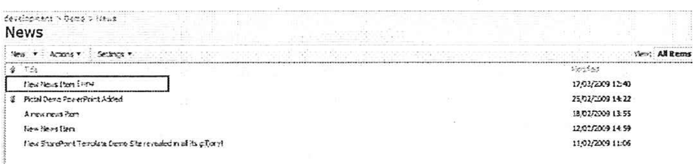
Body: The details of the News Ieem you wish to publish.

Expires: You can seklect an expiry date from the calendar which will remove the News Item when it is considered to be out of date.

Attach File: You can attach a file you already have available to be part of the new item in the same way you would attach a document to an email.



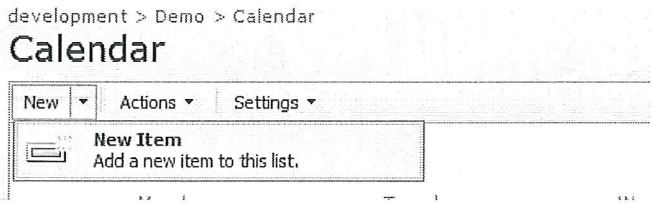
- Clicking OK will add the News Item to the site.



Chapter 6: Calendar

The Site Calendar can be used to highlight dates of interest to the SharePoint Site Audience.

New Calendar dates can be by selecting the 'New' then 'New Item' from the drop-down menu in the Calendar List



To add a new calendar item you can:

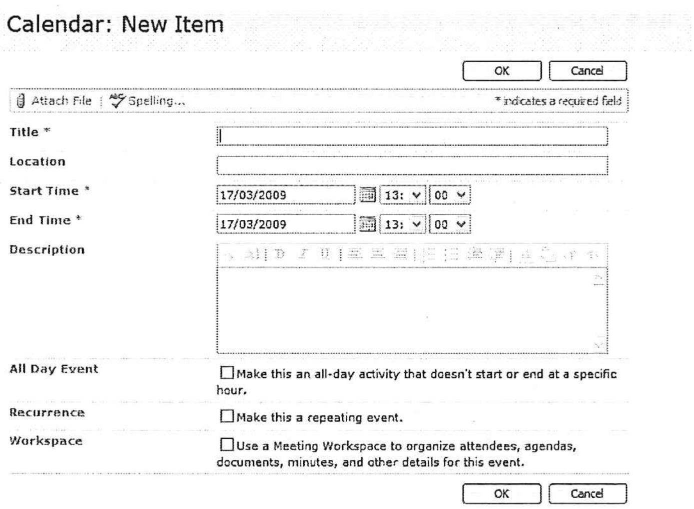
- Select 'New Item' from the 'New' drop down menu.
- Enter the details required

The Title, Location, Time and Description of the meeting.

You can select whetehr the meeting is an all day event or a recurring meeting.

Workspace: You can slect to set up a seprate web space where the results of the meetingcan be added.

Attach File: You can attach a file you already have available to be part of the new appointment in the same way you would attach a document to an email.

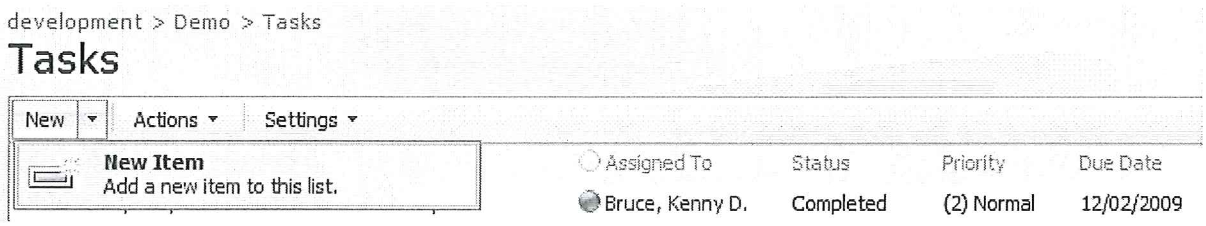


- Clicking OK will add the Appointment to the calendar.

Chapter 7: Tasks

Tasks can be used to set actions and owners of actions to help the monitoring of required activities.

New tasks can be added by 'New' then 'New Item' from the drop-down menu in the Task List



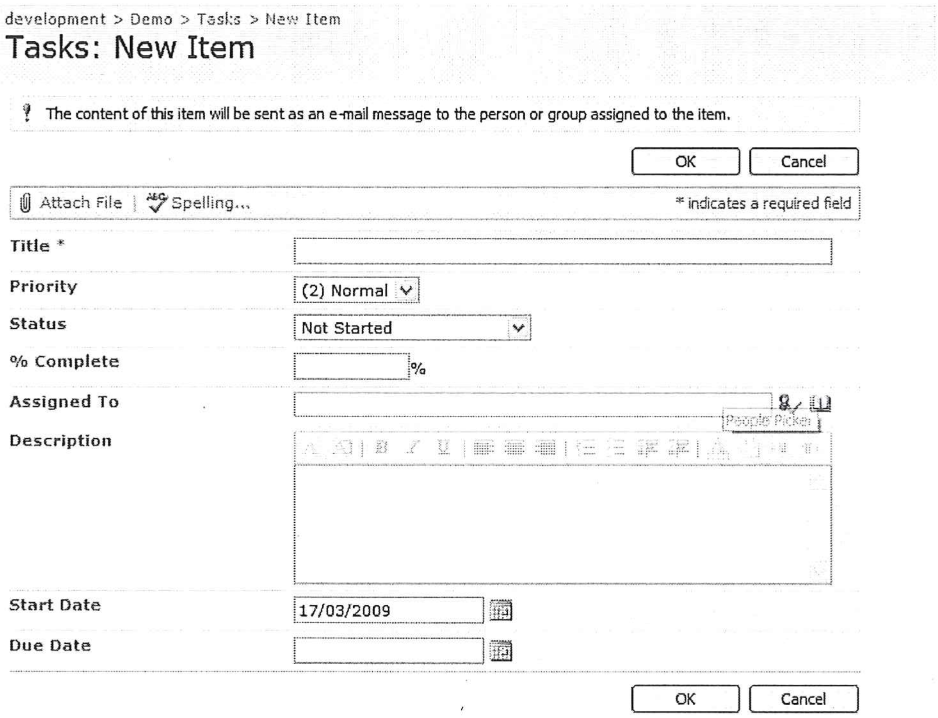
Then by enetring the required details:

The Title and Description of the task.

The Priority, Status and % Complete for the task can be added and edited as required.

Assigned to: Users can select any user to assign the task to by location then using a name search or enetering the user id. You are advised that thiose the task is assigned to will be notified by email

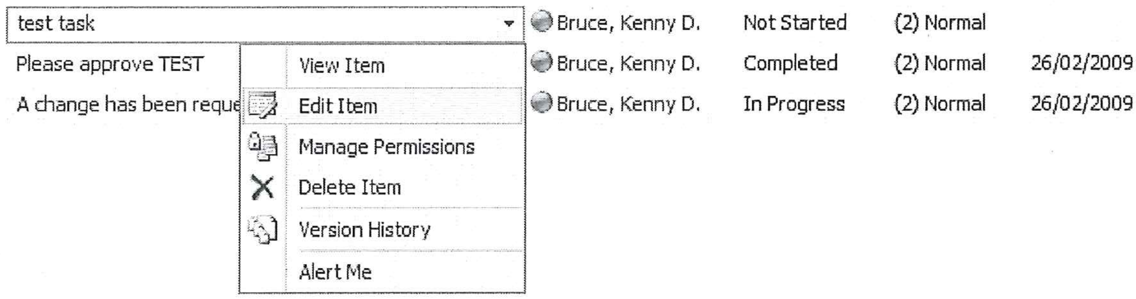
Attach File: You can attach a file you already have available to be part of the new appointment in the same way you would attach a document to an email.



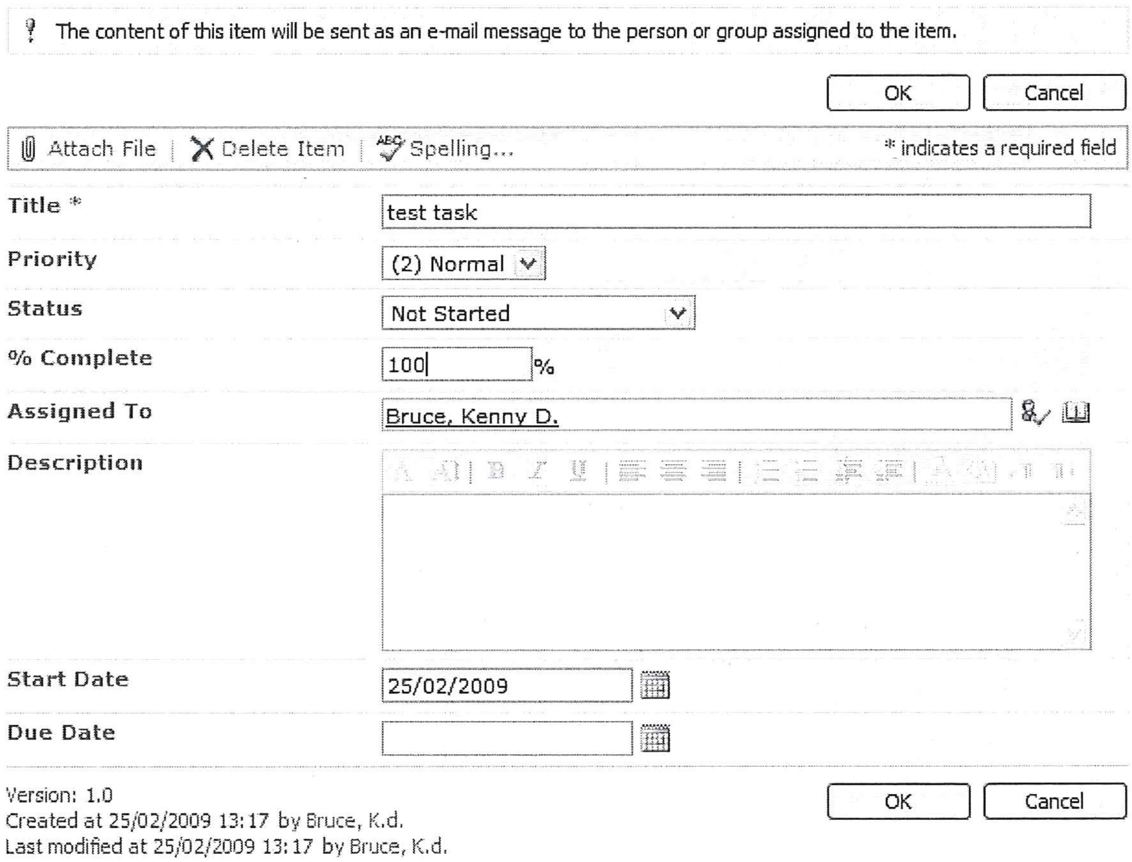
- Clicking OK will add the task to the list and notify the assigned task memebrs by email

Editing a task:

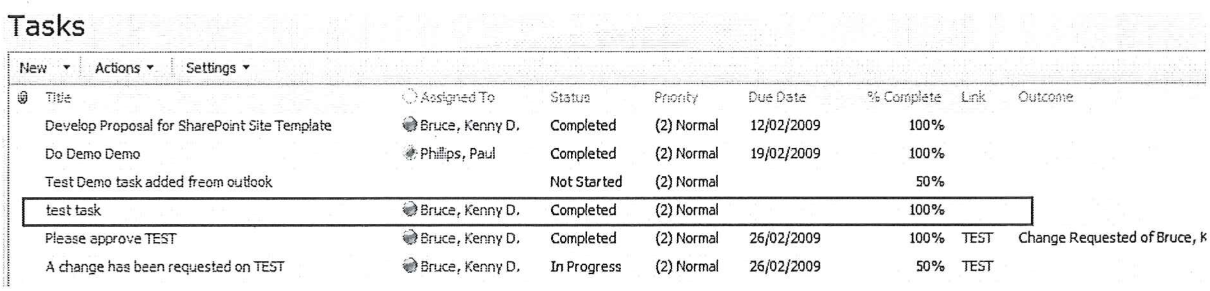
Users with tasks assinged to them can edit the status of a task at any time by slecting 'Edit Item' from the drop down menu next to the task.



The task properties can then be updated.



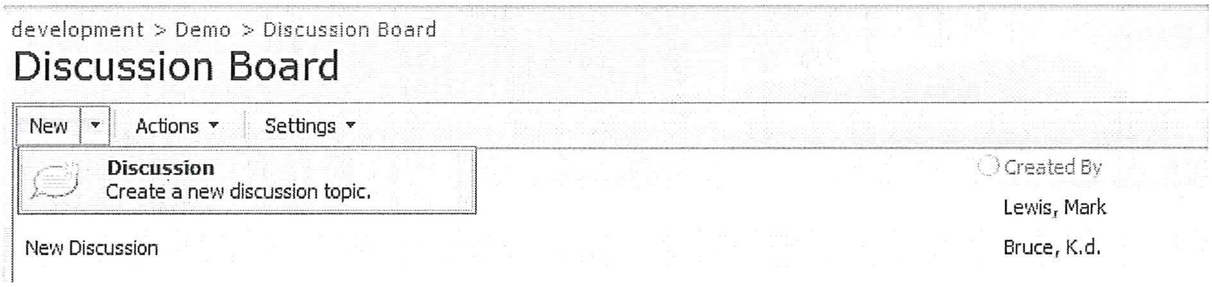
The updated task is then made available on the task list.



Chapter 8: Discussion Boards

Discussion Boards can be used create discussion threats on any particluar topic of interest to the SharePoint Site audience or members.

New Discussions can be added by 'New' then 'Discussion' from the drop-down menu in the Discussions List

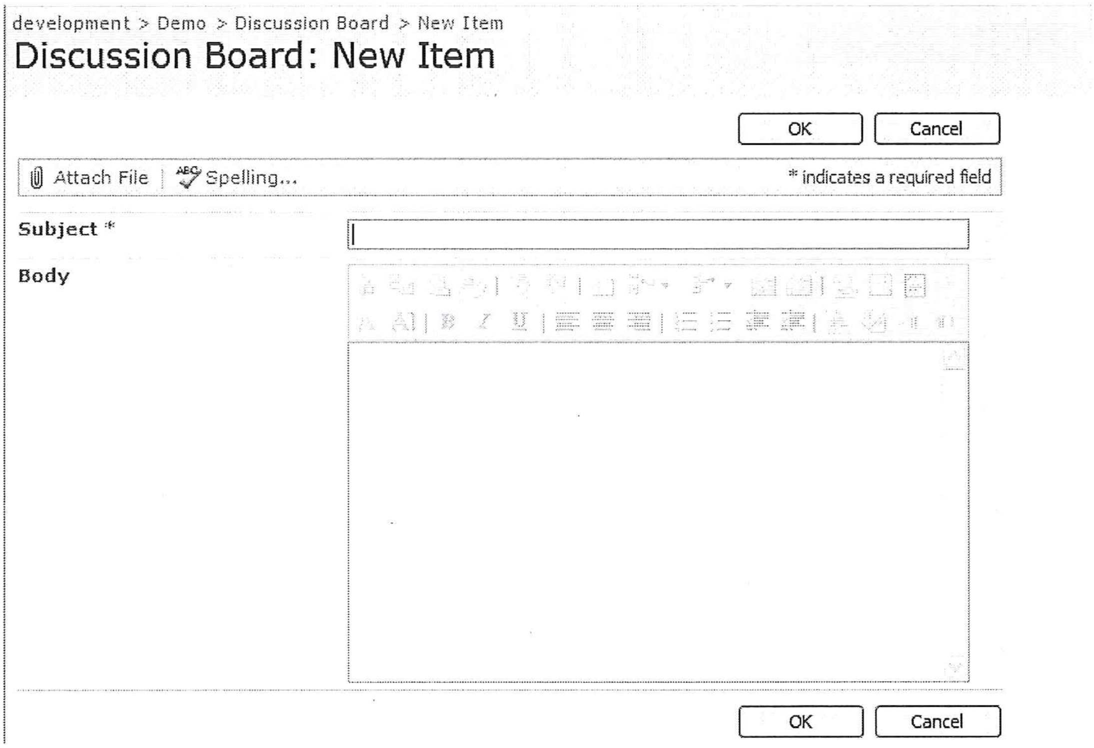


Then by enetring the required details to kick of the discussion:

Subject: the matter to be discussed.

Body: The details of the discussion or an opening remark to get the discussion started.

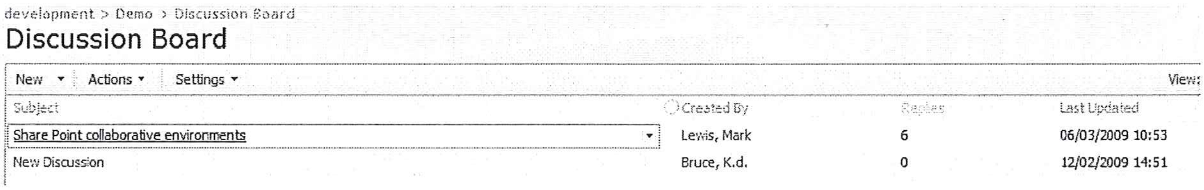
Attach File: You can attach a file you already have available to be part of the new appointment in the same way you would attach a document to an email.

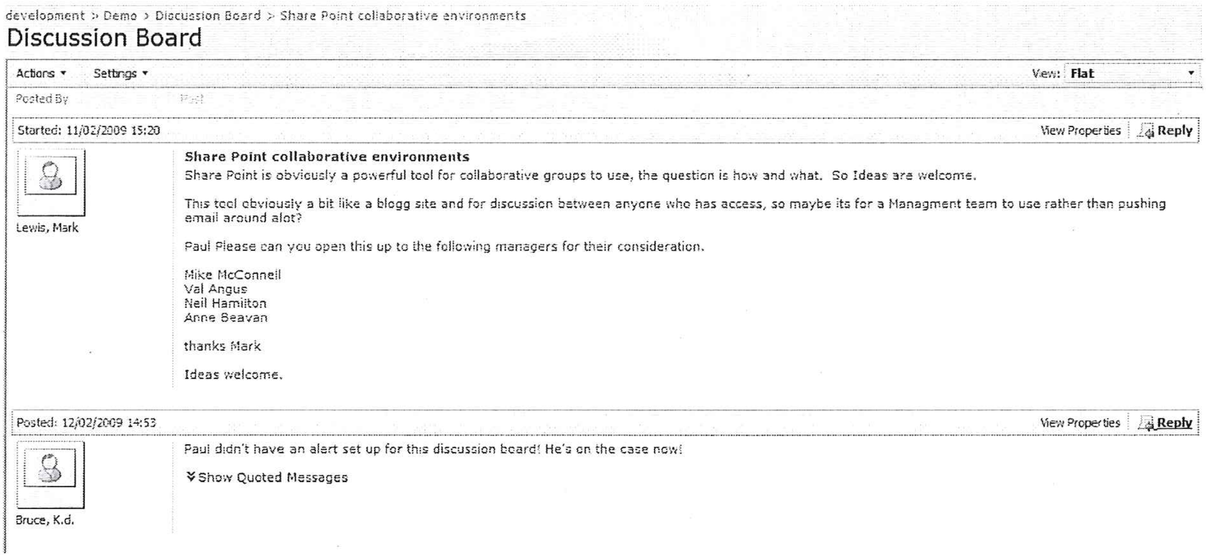


Enetring the details and selecting 'OK' will added the new discussion to the list

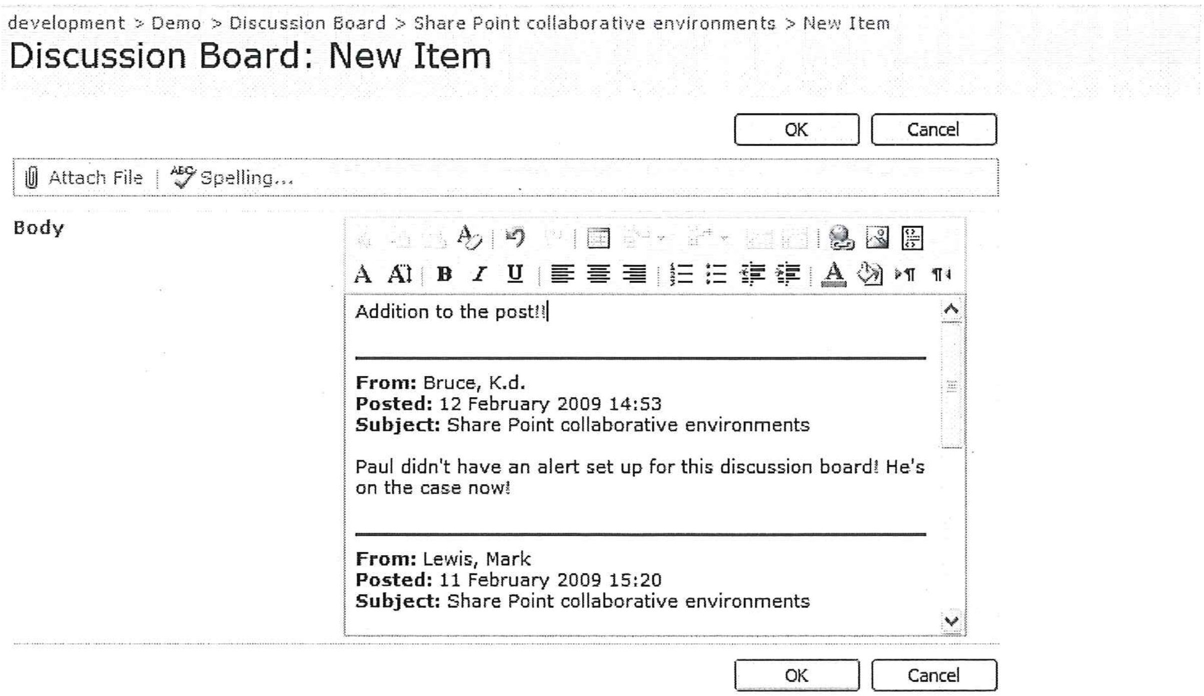
Viewing and replying to a discussion:

Discussions can be opened and viewed by slecting the relevant discussion from the discussion list. The thread can then be read in chronological order by default.





Replies can be made to the discussion by slecting the 'Reply' icon against any post. You can then add your comments to the discussion and submit them by selcting 'OK' when finished.



You post will then be added to the bottom of the thread for others to view and reply to.

fact sheet

Notes for SharePoint Site Owners
Created 30 November 2011

Introduction

Now you are a SharePoint Site Owner you are responsible for:

- creating and maintaining user permissions
- creating new spaces within the SharePoint site e.g. sub-sites
- ensuring accuracy and up-to-date information on the site
- performing the role of site owner for all sub-sites created by you, or delegation of this responsibility
- dealing with queries from users regarding your site (if you are unable to answer a query regarding your site please log a call with the Service Desk, servicedesk@abdn.ac.uk, 273636)

  NOTE: as the Site Owner you are responsible for the content on the site and who has permission to access to it, please be aware of this when considering the type of content you wish to store on SharePoint, if it is highly confidential, we would recommend storing this on a shared drive where the permissions are managed centrally.

Within SharePoint, a standard template called "Team Site" is available for all projects (staff requiring a variation of this should request this via the Service Desk)

A Standard Team Site Includes the following:

- Document Libraries for Storing Documents
- Task Lists
- Resources List
- Announcements
- Calendar
- Discussion Forum

This fact sheet aims to describe the most basic functions a Site Owner will need to perform in the most common features:

- Site Users & Permissions
- Site Structure & Functionality
- Site Navigation
- Look & Feel
- Site Management Tools

Site Users & Permissions

Access to a SharePoint site is managed via the process of you, the site owner, granting permissions either to individual users, to groups of users, or by the site inheriting permissions from a parent SharePoint site:

- **Inheriting permissions:** this is the default SharePoint position (e.g. CASS site has a sub-site called Research – Research would inherit permissions from the CASS parent site unless over-written by you, the site owner
- **User Groups:** User groups can either by manually created by you, the site owner, or automatically generated from the HR database. Automated lists are called ILM (Identity Lifecycle Management) lists. Please note, ILM lists can only be based on certain attributes within the HR database. It is recommended that, wherever possible, permissions are handled by ILM groups, enabling permissions management to be automated. New ILM groups can be requested via the Service Desk.
- **Individual Users:** users can be added by selecting them from a list that links to the University's IT user list in Active Directory. This ensures that users are recognised in SharePoint and can pick up information from other Microsoft Systems (e.g. presence information from Outlook).

There are also three default permission groups already set up for each new site (Owners, Members, and Visitors), and it is recommended that where possible, these are utilised as they will simplify your site management:

- **Owners:** have ***full control*** over site functionality, structure, and content and should be restricted to a small number of individuals
- **Members:** can ***contribute*** to the site (add, amend, delete documents) but do not have any control over site functionality or structure
- **Visitors:** can access all site content but have ***read only*** access

Before setting up your site, you should therefore consider who (which groups and/or individuals) will be accessing your site and what level of access you would like to give them. Completing a diagram, as per below, will help you with this task:

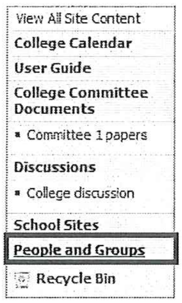
Owners (Full Control)	Members (Contribute Access)	Visitors (Read Only)
• The overall site Owner • Another person in your area who could act as your deputy/take responsibility for this site in your absence • Any other member of staff you wish to give full control of the site to) • DIT Staff who will support your site	Any of the following depending on scope of project/nature of the site: • All University staff managed via the automated ilm list "UOA\ilm_staff". • All staff in your College managed via an ilm list • All staff in your School managed via an ilm list • All core staff in your School managed via an ilm list • All honorary staff in your school managed via an ilm list • All temp staff in your School managed via an ilm list • Existing SharePoint Groups (see People and Groups) • A group or groups you create to help manage access to your site • Individual members of staff • Stakeholders external to UoA via Guest Accounts	Any of the following depending on scope of project/nature of the site: • All University staff managed via an ilm list • All staff in your College managed via an ilm list • All staff in your School managed via an ilm list • All core staff in your School managed via an ilm list • All honorary staff in your school managed via an ilm list • All temp staff in your School managed via an ilm list • Existing SharePoint Groups (see People and Groups) • Group or Groups you create to help manage access to your site • Individual members of staff • Stakeholders external to UoA via a Guest Account

Applying Permissions:

Please note that, as well as applying permissions at site level, permissions can also be managed at sub-site, folder, and document level. However, it is recommended that, wherever possible, permissions are handled at the site level to limit their complexity and minimize permission issues.

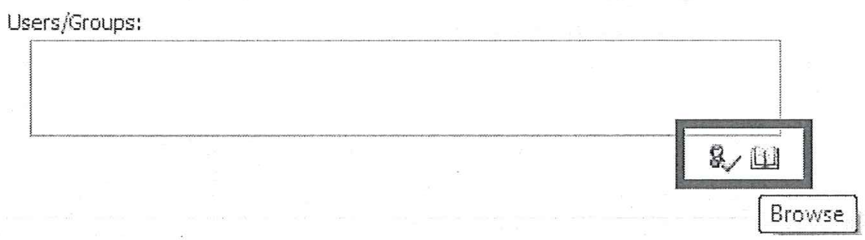
Adding Individuals or groups to "Members" (contribute access) or "Visitors" (read only) permission groups to your site (e.g from an ILM group)

1. From the Quick Launch bar, click on **People and Groups**



2. Click on the **New** button toward the top of the screen, and choose **Add Users**

Click on the **Browse** button



Enter name, group or ILM into t **Find** box and click on the **Sear** button. Choose the individual, group or ILM group from the returned list and select **Add**

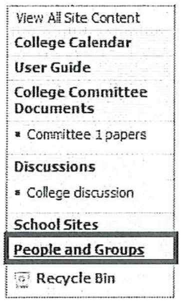
3. Under **Give Permissions** select the appropriate permission group – by default this will be set to **Members [Contribute]**

4. By default an email will be sent to the added users. If you do not wish to send an email, untick the box.

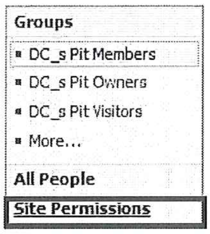
5. Click on **OK**

Setting new permissions for owners, members, or visitors

1. From the Quick Launch bar, click on **People and Groups**



2. Click on **Site Permissions** on the left



3. The next screen lists the default permission levels for each group

    - Members: **contribute**
    - Owners: **full control**
    - Visitors: **read**

4. Click on the name of any one group to see (or edit) the permissions

5. Check and uncheck the permissions on the right, and then click on **OK**

    NOTE: Make sure to leave Visitors as **Read Only**

Set individual user permissions

1. To set permissions for an individual that is different from the group he or she belongs to (e.g. **members**), start by clicking on **People and Groups** in the Quick Launch bar

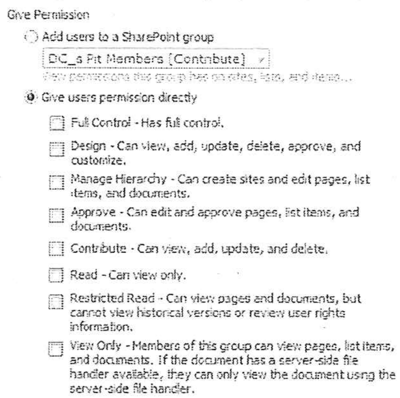
2. Click on **Site Permissions** on the left

3. From the **New** button, click on **Add Users**

    Click on the **Browse** and enter the last name into the **Find** box and click on the **Search** button. Choose the person from the returned list of names and select **Add** button

Under **Give Permission** select the second option: **Give users permission directly**

Choose which level of permission you wish the user(s) to have and select whether or not to send a new welcome message, click **OK**



Site Structure & Functionality

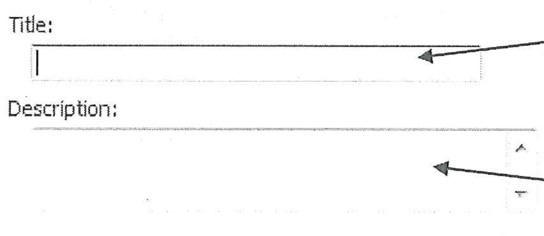
Creating sub-sites

By default, a new sub-site uses the URL of its parent site as the first part of its URL. A sub-site can inherit the permissions and navigation of the existing site, but you can also specify unique permissions and navigation if you wish. For example, a new sub-site uses the existing top link bar and home page by default, but you can specify that it uses its own top link bar and home page.

Before creating a site, make sure that you are at the location on your site where you want to create a new sub-site.

1. Click 

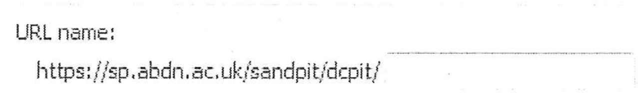
, and then click **Create**.
2. Under **Web Pages**, click **Sites and Workspaces**.
3. In the **Title and Description** section, type a title for your site. The title is a required field.



The title appears at the top of the Web page and appears in navigational elements that help users to find and open the site.

Type a description of the purpose of your site in the **Description** box. The description is optional.

4. In the **Web Site Address** section, type a URL for your site. The first part is provided for you.

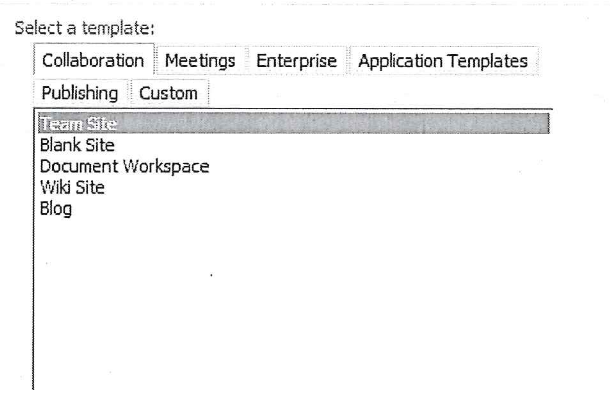


To avoid potential problems with updating or modifying the site, do not enter any of the following special characters as part of the Web address.

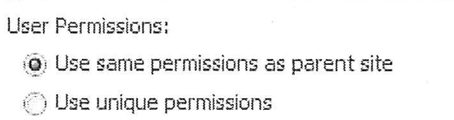
Special characters to avoid

<table>
<tr><td>/</td><td>\\</td><td>:</td><td>*</td><td>?</td></tr>
<tr><td>"</td><td><</td><td>></td><td>|</td><td>#</td></tr>
<tr><td>\t</td><td>{</td><td>}</td><td>%</td><td></td></tr>
</table>

5. In the **Template Selection** section, click the tab that you want, and then select the site template that you want. (n.b. the *Team Site* option has been setup to give you a default starting position:



6. In the **Permissions** section, select whether you want to provide access to the same users who have access to this parent site or to a unique set of users.



If you click **Use Unique Permission** you can set up permissions later afte you finish entering information on the current page.

7. In the **Navigation Inheritance** section, specify whether you want the site to inherit its top link bar from the parent site or to have its own set of links on the top link bar.