Ready Reference 012111

# **Introduction to SharePoint**

## Introduction

SharePoint allows users to collaborate on shared documentation, discussions, tasks, calendaring, and links.

## How to Log In

To log in your SharePoint site:

• go to <u>http://sharepoint.pace.edu/sites/yoursitename</u> (i.e.; <u>http://sharepoint.pace.edu/sites/helpdesk</u>)

Note: If you are accessing SharePoint from off campus, you must first VPN to Pace's network.

A Windows Security dialog box appears.

| Connecting to | sharepoint.pace.edu.                                    |        |
|---------------|---|--------|
|               | User name Password Domain: PACE Remember my credentials |        |
|               | ОК  | Cancel |

- type *pace\your MyPace Portal Username* in the User name field (e.g.: pace\jsmith)
- type your MyPace Portal Password in the Password field

The Home page of the SharePoint site displays. On the Home page you will see a section for *Libraries*, *Lists*, and *Discussions* on the left panel. In the center will be a Welcome message and *Shared Documents* section.

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|--|---|----------|
| File Edit View Favorites Tools Help  |   |          |
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|  | Getting Started<br>Share this site  |          |
|  | Change site theme   |          |
|  | and sets con  | l.       |
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| Done   | Internet   Protected Mode: On 42 *  | € 105% · |



Under Shared Documents you will see all the uploaded documents.

| Shared Documents - |                                   |   |                   |                         |  |
|--------------------|-----------------------------------|---|-------------------|-------------------------|--|
| 🔲 Туре             | Name                              | • | Modified          | Modified By             |  |
| T.                 | Introduction to SharePoint 012111 |   | 1/21/2011 1:19 PM | Bajracharya, Ms. Shikha |  |
| 🕈 Add docur        | nent                              |   |                   |                         |  |

### **Setting Alerts**

You can set up Alerts for this folder where you will receive an alert any time items are modified, added, and/or deleted.

To set Alerts:

- select **Shared Documents** under **Libraries** in the left pane and or select a file under **Shared Documents** in the middle section
- click Actions and select Alert Me next to the file you want to be alerted for



You can then set your options.

- create a title for this alert
- select the radio buttons for your desired notification settings and click **OK**

|  | OK Cancel  |  |
|--|--|--|
| Alert Title<br>Enter the title for this alert.<br>This is included in the subject<br>of the notification sent for<br>this alert. | Shared Documents: Introduction to Sha            |  |
| Send Alerts To   | Users:   |  |
| You can enter user names or<br>e-mail addresses. Separate<br>them with semicolons.   | Bairacharva, Ms. Shikha ;                        |  |
| Delivery Method  | Send me alerts by:                               |  |
| Specify how you want the   | <ul> <li>E-mail sbajracharya@pace.edu</li> </ul> |  |
| act to deliver ed.   | Text Message (SMS) +1-914-806-0180               |  |
|  | Send URL in text message (SMS)                   |  |
| Send Alerts for These<br>Changes   | Send me an alert when:                           |  |
| specify whether to filter  | Anything changes                                 |  |
| criteria. You may also restrict  | Someone else changes a document                  |  |

### **Editing a Document**

### To Check Out Documents for Edits

Checking out a document will lock the document so multiple people cannot make edits at the same time. It is standard practice to check out the document first. When a document is checked out you will see the icon change to display a small green arrow in the bottom right corner of the icon **w**. When this icon is displayed it means that someone has checked out the document to edit.

To check out a document:

| • click the dow  | vn arrow 🔽 ne           | xt to the desir   | ed file name         |                         |   |
|------------------|-------------------------|---|----------------------|-------------------------|---|
| Shared Documents |                         |   |                      |                         | • |
| Type Name        |                         |   | Modified             | Modified By             |   |
| Introduction     | on to SharePoint 051710 | W   | ▼ 1/21/2011 11:58 AM | Bajracharya, Ms. Shikha |   |
| 🕈 Add document   |                         | View Properties<br>Edit Properties<br>View in Browser   | -                    |                         |   |
|                  | <b>(</b> )              | Edit in Browser<br>Edit in Microsoft Word               |                      |                         |   |
|                  | 다.<br>이<br>장            | Check Out<br>Publish a Major Version<br>Version History |                      |                         |   |
|                  |                         | Compliance Details<br>Alert Me<br>Send To               | •                    |                         |   |
|                  | \$<br>*                 | Manage Permissions<br>Delete                            |                      |                         |   |

• click Check Out

The following textbox displays.



- click **OK**
- click on the file link to view the file within the browser

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There are two options when deciding to edit files.

Option 1: Edit in Browser

- click on 🕼 Edit in Browser to edit the file within the browser
- make your changes and click Save 🚽
- click either 🖾 to **Pop-out** or × to **Close** the document

Option 2: Open in Word

• click W Open in Word to pull the file out of the web

When you select **Open in Word**, two options appear.



Since you have already Checked Out this document, you can select **Read-Only** and click **OK.** The selected file will now open separately in the application it was created in.

• make your desired edits and Save changes often as you work

When done, you must check-in your work before others can make edits or view your changes.

#### To Check In Documents after Edits

You must check in your documents after making changes in order to allow other users to check out the document.

• click **File** and select **Info** 



- Note: Make sure to only check out documents that are not currently in use. Otherwise you may experience loss of data when trying to save your changes to a document that is currently checked out by another person.
- click Check-In

You may select the Version Type and enter any comments for the version you are checking in using the *Check-In* dialog box.

Check In

Version Type

What kind of version would you like to check in?

0.3 Mgor version (draft)

1.0 Mgor version (draft)

0.2 Qverwrite the current minor version

Version Comments

Keep the document checked out after checking in this version.

CK Cancel

Note: Do NOT check the box next to "Keep the document checked out after checking in this version."

• click OK

The document will remain open with a new message at the top, "Check Out Required, To modify this server document, you must check it out."



 $\bullet$  click X to close the document

#### **Signing Out of SharePoint**

• click the down arrow next to your name in the upper right hand corner and select **Sign Out** 



A dialog box appears asking, "Do you want to close this window?"

• click Yes