

---

## Introduction to SharePoint 2010

---

### **Overview**

Microsoft SharePoint 2010 is a collaborative web environment that enables its users to get things done. Much like the Microsoft Office suite, it contains many different elements appropriate for the problems that its users are trying to solve.

- Scheduling
- Document exchanging
- Automated business processes

Microsoft SharePoint can handle all this and more.

### **Getting Started**

#### **SharePoint Pages Structure**

As a general guideline, the SharePoint browser window is divided into three areas:

- The Ribbon – located at the top of the page , this section changes often depending on what links is clicked
- The Quick Launch Bar - located at the left of the window, these links are dynamic and can be modified by a user with appropriate permissions.
- The Main Page - this is the largest area of the page and can contain different SharePoint features such as a calendar or a document library.

#### **General SharePoint Roles**

- Reader - this is "read only" permission which allows a user to view but not modify content.
- Contributor – this allows a user to create, modify, or delete content and is probably the most common type of user.
- Owner – this permits complete administration of a subsite or site including creating new sites and customizing them for effective use.

## **SharePoint Structure**

SharePoint at a basic level utilizes three components to manage content and support collaboration:

- Lists - these are repositories that store related items and are usually created and exist within SharePoint.
- Libraries- these are containers for items such as attachments like Word documents or graphical images.
- Sites - the broadest organizational structure is the site collection. A site collection can contain many sites and subsites.

## **SharePoint permissions**

Permissions can be set within SharePoint from a large to a small scale. It is possible to set permissions down to a single document or list item.

- Changing permissions is an administrative task.
- The permissions structure should be planned.
- Whenever possible, it is best to utilize Active Directory groups for managing permissions.

## **SharePoint Lists**

Lists are SharePoint components that are usually grouped together by the function they serve. Some SharePoint lists include:

- Announcements - useful for information bits that keep people updated.
- Calendar - useful for tracking events and can be connected to Outlook.
- Contacts - can keep external information such as vendors for a project or department.
- Discussion board - the SharePoint version of "forums" with topics and threading.
- Tasks - useful for tracking jobs that need to be completed.

## **Announcement Lists**

Announcements are a great way to provide quick updates.

- They can be self-contained news items or links to other content both internal to and external SharePoint.
- Announcements can have an expiration date.
- They support rich text editing.

## **Calendars**

One of the most useful SharePoint lists is the calendar. A site can contain multiple calendars. A user can even overlay an Exchange calendar within a SharePoint calendar.

- SharePoint calendars can be viewed within Outlook.
- Multiple SharePoint calendars can be viewed within the same window.

- A Workspace can be created for managing a meeting including attendees, agenda, documents, etc.

### **Discussion boards**

SharePoint provides a centralized location for communication via a Discussion Board.

- They operate similar to a forum.
- Users can create new topics or reply to existing ones.
- Content can even be added via email.

### **Tasks**

SharePoint includes several web components for tracking what needs to be done. The most basic is the Tasks web part. Tasks can:

- include dependencies and priority levels.
- indicate what percentage of the work is completed.
- be assigned to other users.
- have a start and end date.

## **SharePoint Libraries**

Libraries are SharePoint components that contain objects such as Office documents, images, forms, or even other SharePoint pages. The simplest of these libraries to use is the Shared Document Library:

- The Shared Document Library can store and organize Microsoft Office documents.
- Content can be organized by folders.
- Word, PowerPoint, and Excel documents can be viewed in the browser with some limited editing supported.
- Files can be saved from Microsoft Office to Shared Document Libraries.
- These libraries can be accessed within Outlook.

### **Adding Documents**

Files can be uploaded by any of these methods:

- Clicking the Add document link.
- Clicking the Documents tab and clicking New document or Upload Document
- Add multiple documents using the Upload Document button (Internet Explorer only).
- Using the File - Save and Send option in different Microsoft Office applications.

### **Coauthoring Office Documents**

This feature of SharePoint permits multiple people to edit a document at the same time. This allows one person to be working on a PowerPoint outline while another prepares the design. The following Office applications support coauthoring:

- Word

- PowerPoint
- OneNote
- Excel (within a browser only)

### **Protecting Documents**

There are also times when it is best to protect a document from multiple editors. This can be accomplished by modifying the Versioning settings within a Document library.

- Enable the option "Require documents to be checked out before they can be edited".
- Users must now check out a document before changes can be made.
- No one else can make changes unless the document is checked back in.
- Only administrators can override a document that is checked out.

### **Picture and Slide Libraries**

Users can also use SharePoint for other types of objects including pictures and slides.

- Store images for a department, project, or even organization within a picture library and link to them across the site collection.
- Store PowerPoint slides within a Slide library to help maintain a cohesive appearance within presentations.

### **Wikis**

SharePoint supports wikis. These are basically a collection of SharePoint pages.

- Within a Team Site template, the wiki is called "Site Pages".
- By default "Home", which is the default main page, is store here.
- There is also a guide to SharePoint wiki editing in the page entitled "How To Use This Library".

### **Personalizing SharePoint**

There are several methods of personalizing the SharePoint user experience.

- Users can create email alerts for different parts of SharePoint.
- Users can modify preferences for the appearance of different SharePoint pages.
- Users can click "I Like It" to mark the page as a favorite.
- "Tag & Notes" allows users to enhance the metadata on a page or add notes which function as a comments section.

## Additional Resources

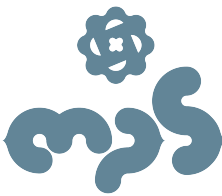
### lyndaCampus



lynda.com is an online software training library. All Duke students, faculty, and staff can access this resource with their Duke NetID.

<http://training.oit.duke.edu/lynda>

### OIT Multimedia Project Studio (MPS)



Need a specialized computer lab with hardware and software to edit graphics, develop a website, edit a video or integrate audio/video into a project? The MPS Labs on East and West campus have all that plus knowledgeable staff to help get you started and keep you going on your project. For location & staffing information for the MPS, visit <http://www.oit.duke.edu/mps> or email [mpslab@duke.edu](mailto:mpslab@duke.edu)

### Sites@Duke Website

The Sites@Duke website itself also has great information, including help with troubleshooting errors in your sites:

<http://sites.duke.edu/>