## USING SHAREPOINT (SPTS) TO CREATE AND CUSTOMIZE YOUR TEAM WEB SITE

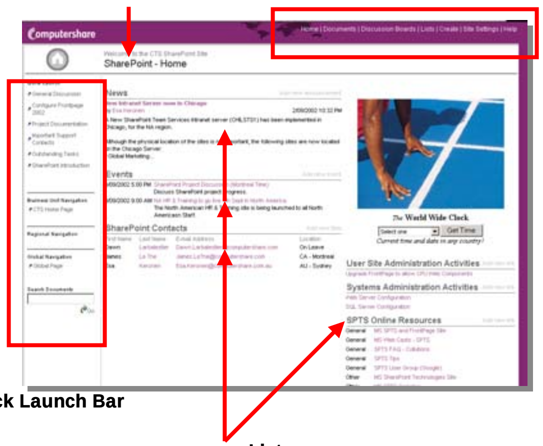
### QUICK REFERENCE GUIDE

### INTRODUCTION

General site maintenance and content management of your web site can and should be done with SharePoint (SPTS) directly from the web browser. Use this Quick Reference Guide to help you to develop and maintain your team web site independently.

### HOMEPAGE - SHAREPOINT TEAM WEB SITE

**Site Name and Description** **Top Navigation bar**



**Quick Launch Bar**

**Lists**

The **Site Name and Description** displays the name and description of the team web site supplied.

The **Top Navigation Bar,** displayed on every page in the team Web site, contains hyperlinks to each of these pages:

- Home
- Documents
- Discussion Board
- Lists
- Create
- Site Settings
- Help

The **Quick Launch Bar** contains hyperlinks to specific pages on the web site. It also contains a search mechanism for locating documents.

A **List** is simply a collection of columns. SharePoint has a number of built-in lists. These include:

- Announcements
- Contacts
- Events
- Links
- Tasks

### CREATING A LIST

To create a list:

1. Select **Create** from the top Navigation Bar
   The page, Create Page appears
2. Click on the list (e.g. Links) you would like to create
   The New List page appears
3. Complete the required fields (as applicable)
   Note: The fields differ from list to list.
4. Click **Create**

**Note**: Should SharePoint's pre-defined lists not suit your requirements, it is possible to create your own list and specify your own columns (e.g. an Inventory list).
Select **Custom List** in the Create Page as detailed in step 2, above.

### ADDING A COLUMN TO A LIST

A column stores information about each item in the list.
To add a column to a list:

1. Select **Lists** from the top Navigation bar
   The Lists page appears
2. Click on the list (e.g. events) to which you wish to add a column
   That lists page appears
3. Click on **Modify Settings and Columns**
   The Customize page for that list appears
4. Click on **Add a New Column** under the Columns heading
   The Add Column page appears
5. Complete the mandatory fields under the Name and Type heading:
   - Enter a column name (Column Name box)
   - Select the type of column information to be stored
6. Complete the optional fields under the Optional Settings for Column heading
7. Click **OK**

### MODIFYING A COLUMN IN A LIST

To modify an existing column:

1. Follow steps 1 through 3 found in **Adding Columns to a List**
2. Click on the name of the column to edit under the Columns heading
   The Change Column page appears
3. Enter a (new) name for the column in the Name box under the Name and Type heading
4. Complete the optional fields under the Optional settings for Column field
5. Click **OK** to save changes

### ADDING A NEW ITEM TO A LIST

To add a new item to a list (e.g. event, link, announcement):

1. Select **Lists** from the Navigation Bar
   The Lists page appears
2. Click on the list to which you want to add a new item
   That lists page appears
3. Select **New Item**
   The New Item page for that list appears
4. Complete the mandatory (marked with a red asterisk) and optional fields
5. Click **Save and Close**

### SORTING ITEMS IN A LIST

Lists, document libraries and discussion boards can be sorted so as to rearrange rows according to the contents of the selected columns. Sorting in ascending order arranges the rows alphanumerically from 0 to 9, A to Z, oldest to most recent.
To sort the rows in a column,

1. Click on the name of the column
   An arrow appears next to the name of the column


The arrow displays the sort order of the rows (i.e. ascending or descending)

### FILTERING ITEMS IN A LIST

Lists, document libraries and discussion boards can be filtered to display only the rows that meet the specified column criteria. Filtering does not rearrange the items – it simply hides the rows you do not want to be displayed.

To apply a filter:

1. Select **Filter** on a page that displays a list, document library or discussion board


2. Select the criteria with which to filter in the box above the title of the column you want to filter
   A filter icon appears next to the filtered icon

To modify a filter:

1. Select **Change Filter**
2. Select the criteria with which to filter in the box above the title of the column you want to filter
   A filter icon appears next to the filtered icon

To remove a filter:

1. Select **Hide Filter Choices**
2. Click **All** in the box above the title of the column being used as a filter

## CREATING A VIEW FOR A LIST

A view is simply a way to look at the contents of a list. A view enables:

- Specific fields to be viewed
- The fields to be sorted differently than in another view
- A subset to be retrieved from the total items in the list

Lists have default views. To suit your requirements, you may create a new view or modify an existing one.

To create a view:

1. Select **Lists** from the top Navigation bar
   The Lists page appears.
2. Click on the list to which you want to create a view
   A new page appears for that list
3. Click on **Modify Settings and Columns**
   The Customize page appears
4. Click on **Create a New View** under the Views heading
   The Create View page appears
5. Complete the fields (as applicable):
   - Type in a name for the view (Name heading)
   - Specify the columns, and their order, to display in this view
   - Determine the order in which the items are sorted (Sort heading)
   - Configure a subset of items to be displayed (Filter heading)
   - Set a return item limit (Item Limit heading)
6. Click **OK**

To modify an existing view:

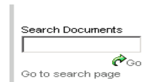
1. Follow steps 1 through 3 in **Creating a View for a List**.
2. Click on the name of the view to modify in the Views heading
3. Complete the fields (as applicable):
   - Enter a name for the view  (Name heading)
   - Specify the columns, and their order, to display in this view
   - Determine the order in which the items are sorted (Sort heading)
   - Configure a subset of items to be displayed (Filter heading)
   - Set a return item limit (Item Limit heading)
4. Click **OK**

## SEARCHING FOR A DOCUMENT

It is possible to search for a document in a specific document library or throughout all of the document libraries available in a site.

To search for a document in a single document library:

1. Click **Documents** in the top Navigation Bar
   The Document Libraries page appears
2. Select the appropriate document library
   The page for that document library appears
3. Type the text to search for in the **Search Documents** box
   The Search Documents box is found in the View bar
4. Click **GO**




To search for a document in all document libraries:

1. Type the text to search for in the **Search Documents** box found in the Quick Launch bar (Home Page)
2. Select **GO**

### SEARCHING TIP:

- The search finds files containing various forms of the words you enter. For example, searching for "swim" finds any documents containing "swim," "swimming," or "swam."

## DOCUMENT LIBRARY TEMPLATES

A template helps to establish consistency within the document library. The template starts when a member clicks on **New Document** in the document library.

### DEFAULT TEMPLATE:

The default template may be selected when the Document Library is first created.  The selected template determines the default document type for all new files created in this document library (e.g. Word, PPT, Excel).

### CUSTOMIZING THE DEFAULT TEMPLATE:

To customize the default template:

1. Click **Documents** from the top Navigation Bar
   The Document Libraries page appears. This page contains a list of all document libraries for the site
2. Click on the Document Library where you want to customize your default template
   That Document Library's page appears
3. Click on **Modify Settings and columns**
   The customize page for the document library appears
4. Select **Edit Template** (General Settings heading)
   The default template starts
5. Customize the template (e.g. add text, styles)
6. Select **File** I **Save As** to save the modifications to the template
   - Enter a name for the template
   - To change the file type, select from the Save as Type drop-down menu
7. Click **Save**

### USING AN EXISTING FILE AS A TEMPLATE:

To use an existing file as a template:

1. Click **Documents** from the top Navigation Bar
   The Document Libraries page appears. This page contains a list of all document libraries for the site
2. Click on the Document Library where you want to add a template URL
   That Document Library's page appears
3. Click on **Modify Settings and columns**
   The customize page for the document library appears
4. Click **Change General Settings** (General Settings heading)
   The Document Library Settings page for that document library appears
5. Enter the URL of the template (Document Template heading)
   Note: The template file must be in the current team web site)
6. Select **Ok**

**Note:** When you create a new document in a document library, you have the choice of saving the document in a program- specific format (e.g. Word) or a web-based format (e.g. .htm)

Before selecting the file format for your document library, it is important to consider the tools your members have available to them. A disadvantage, for example, of using a program-specific format such as Visio is that the member must have the appropriate program installed in order to read the document.

## ADDING AN EXISTING DOCUMENT TO THE DOCUMENT LIBRARY

The document library enables a user to add an existing document to the library.

To add a document to the document library:

1. Click **Documents** from the top Navigation Bar
   The Document Libraries page appears. This page contains a list of all document libraries for the site
2. Click on the Document Library where you want to add your document
   That document library's page appears
3. Click on **Upload Document**
   The Upload document page for that document library appears
4. Enter the required fields:
   - If you want this new file to replace an existing file of the same name in the library, place a checkmark in the **Overwrite if Document exists**?
   - Type in the file name of the document or click **Browse** to locate the document
5. Click **Save** to save the document in the Document Library

## CREATING A SURVEY

A survey provides a way of polling team members.

To create a survey:

1. Click on **Create** in the top Navigation bar
   The page, Create Page appears
2. Click on **Survey**
   The New Survey page appears
3. Complete the required fields:
   - Enter a name and a description of the survey (Name and Description heading)
   - Specify whether a link should appear in the Quick Launch bar (Navigation heading)
   - Specify options for survey (Survey Options heading):
     <u>Display user names in results?</u>
     - To show the user names in the results, check Yes
     - For anonymous results, check No

     <u>Allow multiple responses?</u>
     - To allow users to submit more than one response, check Yes
     - To allow users to submit only one response, check No
4. Click on **Next**
   The Add Question page appears
5. Enter the required fields:
   - Type a question and select the type of answer required for that question (Question and Type heading)
   - Specify if a response is optional or mandatory for that question (Optional settings heading)
6. Click on **Ok**
   The Customize page appears
7. Select **Add a Question** under the Questions heading
   The Add Question page becomes available
8. Repeat steps 5, 6 and 7 to add additional questions
   * Once you have created your survey, go into general settings for the survey and setup the security settings accordingly, i.e. who can Read/Edit the survey and so on

## RESPONDING TO A SURVEY

To respond to a survey:

1. Click on **Lists** in the top Navigation bar
   The Lists page appears
2. Select the survey you wish to respond to
   The page for that survey appears
3. Select **Respond to this Survey**
   Answer the survey by completing the fields
4. Select **Save and Close** to submit your response
   By selecting Go back to Survey, you cancel your response

## CREATING A DISCUSSION BOARD

Discussion boards provide a forum for discussing topics of interest to your team.

To create a discussion board:

1. Select **Discussion Boards** from the top Navigation Bar
   The Discussion Board page appears
2. Select **New Discussion Board**
   The New Discussion Board page appears
3. Complete the required fields:
   - Enter a name and a description for the discussion board (Name and Description heading)
   - Select whether or not the discussion board appears in the Quick Launch bar (Navigation heading)
4. Click **Create**

## DISCUSSIONS

To start, edit and reply to a discussion:

1. Select **Discussion Boards** from the top Navigation Bar
   The Discussion Board page appears
2. Click on the appropriate discussion board
   The page for that Discussion board appears

To <u>start</u> a new discussion:

1. Select **New Discussion**
   The New Item page for that discussion board appears
2. Complete the fields:
   - Enter a subject (topic) for discussion in the Subject box (this is a mandatory entry)
   - Enter a question or a comment in the text box (this is an optional entry)
3. Select **Save and Close**

To <u>edit</u> your own discussion comment:

1. Click on your own discussion comment
2. Select **Edit Item**
3. Modify the comment
4. Select **Save and Close**

To <u>reply</u> to a discussion:

1. Select a discussion item
   The page for that subject appears
2. Click on **Reply**
   The New Item page for that subject appears
3. Enter a question or a comment in the text box
4. Select **Save and Close**

## SUBSCRIPTIONS

The subscription feature enables you to be notified by e-mail of any changes made to the content of your team web site. It is possible to subscribe to:

- Lists
- Document Libraries
- Discussion Boards
- Surveys

The web server notifies you on a scheduled basis if an item is modified or deleted or if a new item is added to the component you subscribed to.

To subscribe to a list, document library, discussion board or survey:

1. Click **Subscribe** on a page that displays a list, document library, discussion board or survey
   Example: Lists I Announcements
   The New subscription page appears


2. Enter the required fields:
   - Select, from the <u>Subscribe to</u> drop-down menu, the list, document library, discussion board or survey you wish to subscribe to
   - Select, from the <u>Notify me when</u> drop-down menu, the type of change you would like to be notified of (e.g. only when an item is added)
   - Enter the e-mail address you would like the notifications sent to in <u>the E-mail address</u> field
   - In the <u>Time</u> drop-down menu, select the frequency with which you would like to be notified of changes
3. Select **OK**

## CUSTOMIZING THE LAYOUT OF THE HOME PAGE

To customize the layout of the home page:

1. Select **Site Settings** from the Navigation Bar
   The Site Settings page appears
2. Click on **Customize Home Page Layout** under the Web Site Settings heading
   The Home Page Layout page appears
3. Click and drag page elements to the desired position:
   - The grey column displays all available lists for that site
   - To move a list to the centre column on the home page, drag the required list to the blue, middle column
   - To move a list to the right column of the home page, drag the required list to the blue column on the right.
4. Click **Save**

## CREATING A SUBWEB

To create a subweb:

1. Click on **Site Settings** in the Navigation Bar
   The Site Settings page appears
2. Click on **Create a Subweb** under the Web Administration heading.
   The Create a Subweb page appears

3. Complete the required sections:
   - Enter the name for the new subweb in the Name box (Create a New Subweb heading)
   - Specify permissions for the subweb (Permissions heading):
     Select **Use Same Permissions** as Parent Web to retain the same security settings as on parent site
     Select **Use Unique Permissions** for this Web to use different security settings than those of parent site.
   - Specify the administrator user name in the form Domain\user
   - Select SharePoint based Website (Site Type heading)
4. Click **Submit**
   The Web Site Administration page appears
   The new subweb is created. There is no link to the subweb from the parent site.

### TO CREATE A LINK TO YOUR SUBWEB FROM THE PARENT SITE

1. Copy the URL address of your newly created subweb from the Web Site Administration
   The URL is found under the Subwebs heading
2. Add a new link in the Links list:
   - Select the Links list
     That lists page appears
   - Select New Item
     The New Item page for that list appears
3. Paste the copied URL in the URL field of the New Item page
4. Complete the mandatory fields (marked with a red asterisk)
5. Click **Save and Close**
   The link to your new subweb is now found under the Links list of the Parent Home Page.

## SENDING INVITATIONS

It is possible to invite a group of users to a web site and create new accounts at the same time.
To send an invitation:

1. Select **Site Settings** from the top Navigation Bar
   The Site Settings Page appears
2. Select **Send Invitation** (Web Administration heading)
   The Send an Invitation wizard starts
3. **Step 1 of 3**: Enter the e-mail address of each team member you would like to invite to the site
   Example: johndoe@computershare.com
   Each invitee receives invitation e-mail in their inbox
   Note: Type only one address per line
4. Select **Next**
5. **Step 2 of 3**: Ensure that accounts are correct.
   Note: Members of site must have local accounts on the server
6. Select **Next**
7. **Step 3 of 3**: Add a personal greeting and select a role
   The same role and greeting will be sent to each invitee
8. Select **Finish**
   The confirmation Page appears

## MANAGING USERS

Users are assigned to a role that governs the rights they have in a team web site. The administrator of a site can specify such roles.
To add, remove or modify a user's website membership:

1. Click on **Site Settings**
   The Site Settings page appears
2. Select **Manage Users** under the Web Administration heading
   The Manage Users page appears

To <u>add</u> a user:

1. Click on **Add a User**
   The Add User page appears
2. Enter the required fields:
   - Select Add User or Group Name and enter the user name in the form domain\name (User heading)
   - Assign a role for the user (User Role heading)
3. Click on **Add User**

To <u>delete</u> a user:

1. Select the user you wish to delete from the Manage Users page
2. Click on **Remove selected user(s) from all roles**
3. Click **OK** in the Microsoft Internet Explorer dialog box

To <u>modify</u> a user's membership:

1. Click on the name of the user whose membership you wish to modify from the list in the Manage Users page
   The Edit User Role Membership page appears
2. Modify the user's role
3. Click **Submit**

## CUSTOMIZING USER ROLES

SharePoint has five (5) pre-defined user roles. Computershare, however, requires slightly customized user roles.

To modify the default user roles for your team website:

1. Select **Site Settings** from the top Navigation bar
   The Site Settings page appears
2. Select **Go to Site Administration** under the web administration heading
   The Site Administration page appears
3. Select **Manage Roles** under the Users and Roles section
   The Manage roles page appears
4. To <u>edit</u> a role:
   - Select the role name (hyperlink blue)
     The Edit Role Page (for that role) appears

   To <u>delete</u> a role:
   - Check the role(s)
   - Select **Delete Selected Role(s)**
5. Modify the default roles as tabled below:

| User Role | Action |
|---|---|
| Administrator | <u>Web Administration Rights heading</u>:<br>**Uncheck** Create Accounts - User can create local machine accounts |
| Advanced Author | <u>Role Description heading:</u><br>**Delete** 'themes and borders**'**<br>**Add** 'manage lists, roles and subwebs' |
| | <u>Web Design Rights heading:</u><br>**Uncheck**:<br>Theme Web – User can apply a theme to a web site<br>Border Web – User can apply a border to a web site<br>Link Style Sheets – user can apply a style sheet to a web site |
| | <u>Team Contributor Rights heading:</u><br>**Check** Manage Lists – User has administrative control of all lists |
| | <u>Web Administration Rights heading</u>:<br>**Check**:<br>Configure Access – User can create, delete, modify roles, including adding users to the roles and specifying which rights are assigned to a role<br>Manage subweb – User can create, rename or remove subwebs<br>Manage Web Document Discussions – User can add, edit or remove and close web document discussion items for a virtual server<br>Manage Web Subscriptions – User can add, edit or remove web subscriptions for a virtual server |
| Author | Delete this role |
| Contributor | No changes |
| Browser | <u>Team Contributor Rights heading:</u><br>**Uncheck** View Web Document Discussions – User can read web document discussion items |

6. Click **Submit** after modifying each role.