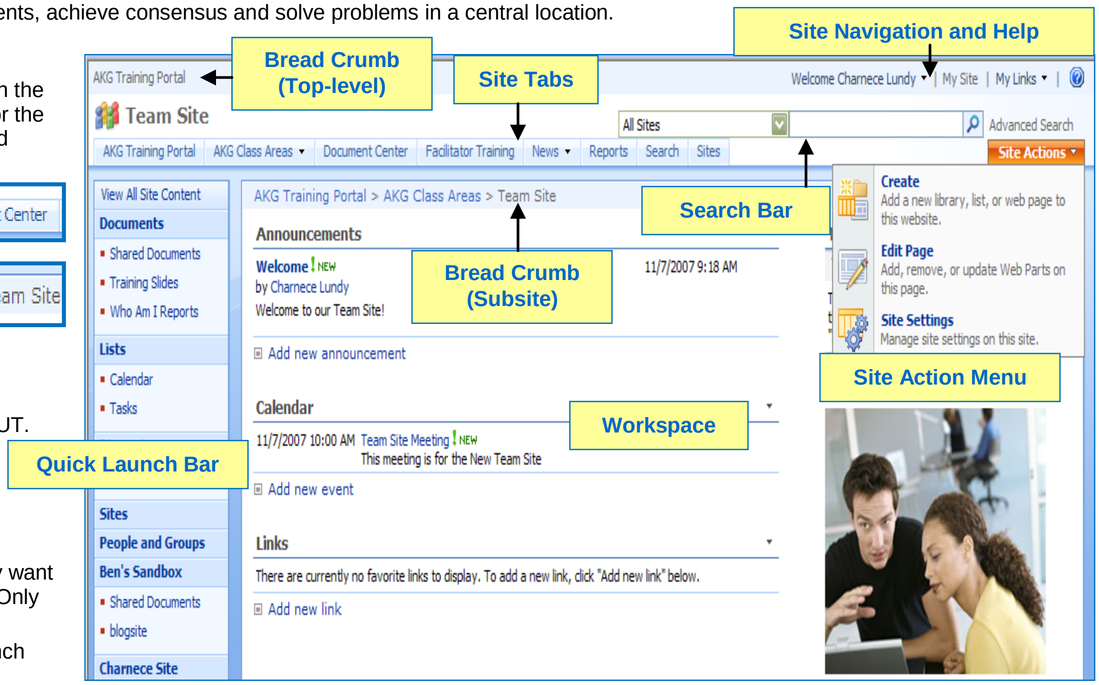
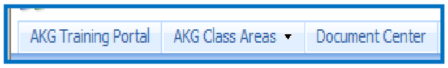
Microsoft Office SharePoint Server (MOSS) 2007™
Basic Features Quick Reference

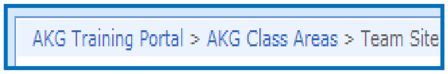
The SharePoint environment is a powerful, integrated and secure Internet workplace that allows multiple users to communicate, collaborate, manage documents, capture tasks, schedule events, achieve consensus and solve problems in a central location.



Dynamic Navigation

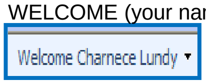
Anywhere in the WORKSPACE, point in the SITE TABS or the BREAD CRUMBS for the Top-level or the Subsite to move up and down the hierarchy.





Sign Out

From the Site Navigation bar, click WELCOME (your name), then SIGN OUT.



Read a File

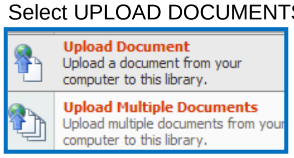
You do not have to edit a file if you only want to view it. The file will appear as Read-Only

1. Click on Document Library or the documents Title from the Quick Launch bar.
2. On the page that displays the library, click the NAME of the file.
3. If prompted with a "file may harm your computer" window, click OK.
4. If you are prompted to re-enter your password, do so and click OK
5. If prompted with the File Download dialog box, click OPEN.

Upload a File

Document libraries are collections of files that you share with team members.

1. Click on Document Library or the documents Title from the Quick Launch bar.
2. From the Library, click the UPLOAD drop down arrow.
3. Select UPLOAD DOCUMENTS

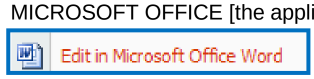


4. Click the BROWSE button to search for the document that's located on your computer.
5. Once you select your document, click OPEN.
6. Check: Overwrite existing files.
7. Click 0K.
8. The document has uploaded successfully.
9. To update the properties of the document click EDIT PROPERTIES.
10. Edit the document NAME and TITLE.
11. If Categories are being used to organize this library, specify which location to store this document under by clicking the CATEGORIES drop down arrow and selecting a location.
12. Click OK.

Edit a File

SharePoint allows us to take turns to make changes to files stored in a SharePoint document library. If someone is already working on the document, you will only be able to view it as Read-Only.

1. Click on Document Library or the documents Title from the Quick Launch bar.
2. Click the TITLE drop down EDIT menu next to the file and select EDIT IN MICROSOFT OFFICE [the application].



3. If prompted with "file may harm your computer", click OK.
4. If you are prompted to re-enter your password, do so and click OK.
5. Edit the file and SAVE [changes are now saved to the library in SharePoint]
6. CLOSE by clicking the **X** at the top right.

Create New Contacts (edit and delete)

1. Click on CONTACTS on the Quick Launch Bar.
2. Click the NEW drop down arrow.
3. Select NEW ITEM.
4. Enter all the Personal Information of the individual (First Name, Last Name, Email Address, Phone, Address, etc.).
5. Click OK.
6. To Edit Item or Delete Item, hover over the person's name, select VIEW ITEM.
7. Select EDIT ITEM to make changes to this persons contact information or DELETE ITEM to delete this person from the contacts list, then click OK to save changes.

Create a New List Item

Lists are tables of stored information and include team Announcements, Task Lists, Issue Lists, Contacts, Events, Links and Surveys.

1. Click the word ANNOUNCEMENTS on the workspace**,** then click NEW down arrow.
2. Click 

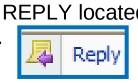
3. Enter the TITLE.
4. Enter the BODY.
5. Enter the EXPIRATION date by clicking the calendar icon.
6. Click OK.

Edit a List Item

1. Click the TITLE of the Item.
2. From the Items page, select EDIT ITEM.
3. Make your changes to the announcement.
4. Click OK.

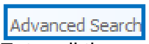
Reply to a Discussion

Discussions are special lists that offer team members a common space to post ideas. Reply to any Discussion Topic to post your thoughts and comments.

1. Click on Discussion, or click the discussions Title from the Quick Launch bar.
2. From the Discussion Library, click the TITLE of the TOPIC in which you want to POST your reply.
3. Click REPLY located to the far right of the page. 

4. Enter your comment and click OK**.**

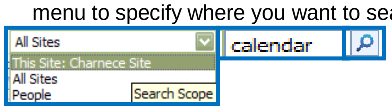
Advanced Search

1. Click the ADVANCED SEARCH link to search from ALL SITES or PEOPLE.


2. Enter all the appropriate fields to help narrow your search.
3. Click SEARCH.

Simple Search for a File or Other Item

You may search for files or items from anywhere in the site.

1. Drop open the SEARCH NAVIGATION menu to specify where you want to search.


2. In the KEYWORD box, enter a keyword or several as your search criteria.
3. Click the MAGIFIN GLASS button 

Add an Alert

You can request notification through email about additions, deletions, and changes to lists, list items, libraries, and other parts of all MOSS sites.

1. Click on Document Library or the documents Title from the Quick Launch bar.
2. From the Library, click the ACTIONS drop down arrow and select 

3. Enter the preferred Subject line for your alert email messages in the ALERT TITLE field.
4. In the SEND ALERTS TO section, confirm that the destination email address is correct.
5. In the CHANGE TYPE section, specify whether you want to be notified for all changes, or when items have been added, changed, or deleted.
6. In the SEND ALERTS TO THESE CHANGES specify whether to filter alerts based on specific criteria.
7. In the WHEN TO SEND ALERTS section, click how often you want to be notified of changes.
8. Click OK. Repeat steps 2-8 for each alert.

Create a document in a Document Library

1. From the Quick Launch bar select the Document Library where you want the document created
2. From the Documents Library, click the NEW drop down arrow.
3. Select 

4. You will see a pop up screen and click OK
5. If prompted to re-enter your password, do so and click OK
6. You will be taken to Microsoft Word, type your document and click SAVE
7. A SAVE AS screen will appear, type in the FILE NAME and click SAVE
8. Once saved, click the red EXIT button on the top right corner to return to the Site.

Delete a Document

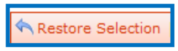
1. Click on Document Library or the documents Title from the Quick Launch bar.
2. From the Library, hover over the name of the document.
3. Click on the DROP DOWN ARROW.
4. Click 

5. Click OK to send to Recycle Bin.

Recycle Bin

You deleted a document and want to restore that document back into the library.

Restore:

1. Click **Recycle Bin** located on the Quick Launch Bar
2. From the Recycle Bin page, check the BOX next to the document
3. Click 

4. A pop up window will display, click OK to restore.

Delete:

1. Click **Recycle Bin** located on the Quick Launch Bar
2. From the Recycle Bin page, check the BOX next to the document
3. Click 

4. A pop up window will display, click OK to delete.

Add a link to My Links

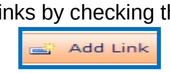
Internal:

1. Go to the page that you want located under your My Links
2. From that location, on the Site Navigation Bar click MY LINKS drop down arrow
3. Select 

4. From the Add to My Links webpage, leave the Title and Address as is, and select who you want to show this link to
5. Click OK
6. To view your new link, click the MY LINKS drop down arrow

External:

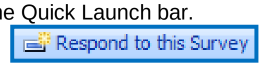
1. Go to the page that you want located under your My Links
2. From that location, on the Site Navigation Bar click MY LINKS drop down arrow
3. Select 

(NOTE: Manage Links can add, edit, and delete links by checking the items box)
4. Click 

5. Enter the TITLE and ADDRESS (Yahoo, Google, etc.)
6. Select who you want to show this link to
7. Click OK

Respond to a Survey

Surveys are lists for team members to respond to questions or give feedback.

1. Click on Survey, or click the surveys Title from the Quick Launch bar.
2. Click 

3. Make your response or give feedback and click FINISH.

Create a Subsite

Your My Site is the top level site in your site collection. Any sites that are created under this top site are called subsites.

1. Click  drop down arrow.

2. Select CREATE.
3. Under the heading of WEB PAGES, select SITE AND WORKSPACES.
4. Enter the TITLE.
5. Enter the URL address; keep it short with no spaces.
6. Choose a template.
7. To have permissions different from top site choose UNIQUE PERMISSIONS.
8. Display this site on the Quick Launch of the parent site, select YES/NO.
9. Use the top link bar from the parent site, select YES/NO
10. Click CREATE.
11. If your selected Unique Permission indicate VISITORS, MEMBERS, and OWNERS by using an EXISTING GROUP or create a NEW GROUP. Use the address box to choose names.
12. Click OK .

Check Out and Check In

If someone has already checked out the document, you will only be able to view it as Read-Only copy. When the document is checked back in with corrections, then you will be able to edit.

1. Click on Document Library or the documents Title from the Quick Launch bar.
2. From the Library, hover over the name of the document.
3. Click on the DROP DOWN ARROW.
4. Click 

5. A window will display your check out, click OK.
6. Click the TITLE drop down the EDIT menu next to the file and select EDIT IN MICROSOFT OFFICE [the application].
7. If prompted with “file may harm your computer”, click OK.
8. EDIT the file and SAVE.
9. EXIT from the file by clicking the **X** in the top right corner.
10. A window will prompt you to CHECK IN the document, click OK/YES.
11. Add descriptive comments, click OK.

Determine Check-Out Status

View the status to see who checked-out the document.

1. In the Document Library, point at the green and white arrow associated with the file icon on the far left to see who has the file checked out.
2. Files without the arrow are ready to be checked-out by someone else.