

Data Manager's SharePoint Training Outline

The Getting-Started Basics

- **Browser Considerations** – SharePoint works best with Internet Explorer. Please use it when using SharePoint, as we cannot account for how SharePoint works with other browsers.
 - Using Firefox and other browsers will make it difficult to respond to discussions.
 - Some menus may not function properly with other browsers.
 - There are some add-ons listed in the User Guide if you must use a different browser.
- **Log in:** <https://members.natureserve.org>
 - username: native\firstname.lastname password: Sharepoint2
 - Once logged in, you can change your password by clicking on the Password Management link on the bottom of the Quick Launch menu on the left-hand side.
 - If you forget your password, contact [Shelley Cooke](#), and she will reset it for you.
- **Permissions**
 - Most Network staff have permission to view almost all content within the site. Occasionally, there is a need to restrict permission of certain documents or parts of sites.
 - Advanced permissions controlled through the site administrator.
 - Contractors are only allowed to see sites that they need access to.
- **The Home Page** – Shows a summary of what has been updated recently on the SharePoint site.
- **The Quick Launch Bar** – For navigating from within the site.
 - Is dynamic depending on what site or sub-site you are within SharePoint.
 - Displays links to the various pages, lists, libraries, and sub-sites within the site you are on.
- **The Navigation Bar** – For navigating from within the site and moving between sub-sites.
 - Stays static throughout the entire SharePoint site.
- **Lists vs. Libraries** – SharePoint uses the terms “lists” and “libraries” when talking about sections of the SharePoint site.
 - **Lists** –stored as rows within that list, not as separate documents.
 - Calendars, Announcements and Discussion Boards are examples of lists.
 - **Libraries** – used for the creating, storage, revision, and versioning of files.
 - Document Libraries and Wiki Pages are examples of libraries.
- **Shared Documents** – This library is the main library used to post documents that would be beneficial to the Network, and probably the place you will go to most.
 - You can create, upload, download, and edit documents.
 - Most libraries require you to Check-Out and Check-In documents if you want to edit them.
 - See User Guide and Check-In/Check-Out document in the Help Documents library.
 - If you are viewing/downloading a document to keep for yourself, you don't have to check it out.
- **Working Groups** - Project-based, targeted sub-sites.
 - Targeted to a specific project or group of people.
 - Usually invited to join a Working Group but sites are generally not restricted.
 - Set up similar to the main SharePoint site.
 - If you have an idea for a new Working Group, fill out the New Working Group Request Form found in the Help Documents.
 - The person who requests the Working Group usually administers the site.

Using and Organizing Lists and Libraries

- **Descriptions or “Tags” – FORGET FOLDERS!** When you add new content to the SharePoint site, most of the time you will be required to assign descriptions or “tags” to your content. This helps in sorting, filtering, and searching for content. It is the basic organizing block for the site.
 - **Primary Description** – Limited to high-level subject areas (Mandatory).
 - Current choices are Conservation Planning, Data Management, Leadership/Networking, Methodology, Science, Tools/Technology.
 - Can only choose one.
 - May add more if there is a proven need.
 - **Secondary Description** – Further describes your content. Standard choices are things like disciplines and key network activities (Mandatory).
 - You can specify your own value if none of the standard choices fit.
 - You can select more than one item - choose all that you think fit.
 - In some instances, it may be the same as Primary Description.
 - **Related Product** – Select the NatureServe product to which your item pertains.
 - You can specify your own value if none of the choices fit.
 - If your item is not product-related, you can leave it blank.
 - **Custom Tags** – When adding content, in addition to the Primary and Secondary description, you have the option of further describing your post with a “Custom Tag”.
 - The power of SharePoint organization lies within the Custom Tagging option.
 - Allows you to create specialized “Views” to query or filter for content.
 - Custom Tags are stored in a Custom Tag list that is custom to each site within SharePoint.
 - Links to the Custom Tags list are shown towards the bottom of the Quick Launch bar on the Site’s home page.
 - Check your custom tags list prior to uploading your document, as you can’t add a new tag from within the upload screen.
 - **Description** – Some list and libraries may ask for a Description (not mandatory)
 - Text field that you can give a little further description about your document that may not be apparent by the title or tags.
- **Sorting Libraries or Lists** – Two options
 - Click on the heading title once and it sorts in ascending order. Click again, it sorts in descending order.
 - Hover your mouse next to the Header you would like to sort on and a dropdown menu appears. Click your choice of Ascending or Descending.
- **Filtering Libraries or Lists** – Limits the number of items you see based on what you are interested in.
 - **Filter on the Fly** – Hover your mouse next to the header you would like to filter on and choose the item you want to filter for.
 - You can filter more than one column.

- **Create a custom filter or “View”** – Allows you to save your filter as a View for easy retrieval
 - Can filter for multiple columns
 - Can sort the view.
 - Can group items based on values like Primary Description.
 - Can filter for multiple values within a column by using “or”/“and”.
 - There are a handful of Standard public views accessible to everyone. You can create your own private views viewable to only you.
 - Send ideas for more public views to contact [Shelley Cooke](#).
 - Detailed instructions on how to create a View are in the User Guide.

Other Cool Features

- **Alerts** – Alerts can be set up on almost any section of SharePoint.
 - Send you an e-mail based on the criteria you enter.
 - Can set it up for discussion forums based on “tags” or working groups.
 - Can set Alerts to events in the calendar, when a document is edited or if something is added to list or library.
 - Can set the frequency of alerts (Immediate, Daily, and Weekly).
 - Can manage all your alerts for a site in the My Settings area.
- **Forum** – Forums are used to start discussions where you can ask questions, provide feedback and stay informed.
 - Will take the place of current list serves sometime in the near future.
 - You can add attachments to this discussion forum.
- **Announcements** – A place to post network-wide announcements or announcements pertinent to your Working Group, Resource Site, or other sub-site.
 - Appropriate content would be information on conferences, job announcements, staff changes, cool innovations to share with the network etc.
 - Sub-sites also have an Announcements list where you can post targeted announcements to the group.
- **Calendar** – Use the calendar to post events and deadlines in which the Network or group would be interested in.
 - Appropriate content would be training dates, conference dates, benchmark standard deadlines, grant submission deadlines, conference calls etc.
- **Network Links** – Network links provides a place to post links that would be useful to the network.
 - Can create links to URLs, documents, surveys, articles of interest, documentation etc.
- **Resource Sites** – A collection of mini-sites dedicated to topics that are of particular ongoing importance to the network and need their own site in order to store and convey information in an organized way.
 - Also organized similar to the main SharePoint site.
 - Current Resource Sites are LandScope, Funding, and Biotics.
 - Can also have sub-sites within the main site:
 - Within the Funding Resource Site, you may have a sub-site dedicated to a particular grant that multiple programs are collaborating on.
 - Will probably be adding more Resource sites as needed.

- **Search** – Use the search function to look for documents, discussions, tags, or other items in SharePoint you are interested in.
- **Google Translator** – In order to accommodate our non-English speaking contingent, we are trying to provide alternatives.
 - There is a link to Google Translator on the Top Navigation Bar which will translate text that is copied and pasted in the box.
 - You can download the Google toolbar which comes with a translator option in which you can translate entire web pages.
 - LAC site is entirely in Spanish!
- **Help** - There are several ways to get help from within the SharePoint **Help** Site.
 - Go to the Help site by clicking on the link from the top Navigation Bar (or the Quick Launch Bar if you are on the main site).
 - Check the Help Documents folder first!
 - Look in the **User Guide** and see if your question is answered there.
 - Look at other documents in this folder to see if there might be appropriate documents.
 - Check the FAQ page to see if your question is answered here (more content will be added on a continual basis).
 - Check the SharePoint discussion in the Help site. If no discussion exists, start one!
 - Questions you ask here will be answered by staff and then put in the FAQ area and added to the User Guide if appropriate.
 - Send an e-mail to contact [Shelley Cooke](#) if you are having technical problems and need immediate assistance.
- **Password Management** – This page allows you to change your password.
 - Must be 7 characters long, have one number, one uppercase letter and one lowercase letter.
 - Can only change your password once in a 24-hour period.
 - Eventually you will be able to update other information here like e-mail, phone number etc.
- **A work in Progress!** – Please remember that this site is a work in progress.
 - E-mail contact [Shelley Cooke](#) with comments/suggestions.
 - Please use the site and encourage others to use it too!