

Instructions for SharePoint 2007 Users

- 1. Work with folders and documents in a Shared Documents Library.....1
 - 1.1 Check out and edit a document1
 - 1.2 Create a New Document2
 - 1.3 Upload One or Multiple Documents2
 - 1.4 Move, delete, copy or rename documents or folders2
 - 1.7 Recover a deleted file from the Recycle Bin2
 - 1.8 Create a link/shortcut to a folder or document library2
 - 1.9 Make a New Documents Library (If you have permission to do so)3
 - 1.10 Make a New Folder3
 - 1.11 Set an Alert for the Document Library3
 - 1.12 Route a Document for Approval or to Collect Feedback4
- 2. Web Parts4
 - 2.1 Add an announcement, an event to a calendar, A New Link.....4
 - 2.2 Modify a Web Part5
 - 2.3 Connect a SharePoint Calendar to Outlook5
- 3. View Contacts in SharePoint and connect them to Outlook.....5
- 4. Create or modify a task and connect it to Outlook5

Access your SharePoint Web site at <http://sp.mu.edu>

1. WORK WITH FOLDERS AND DOCUMENTS IN A SHARED DOCUMENTS LIBRARY

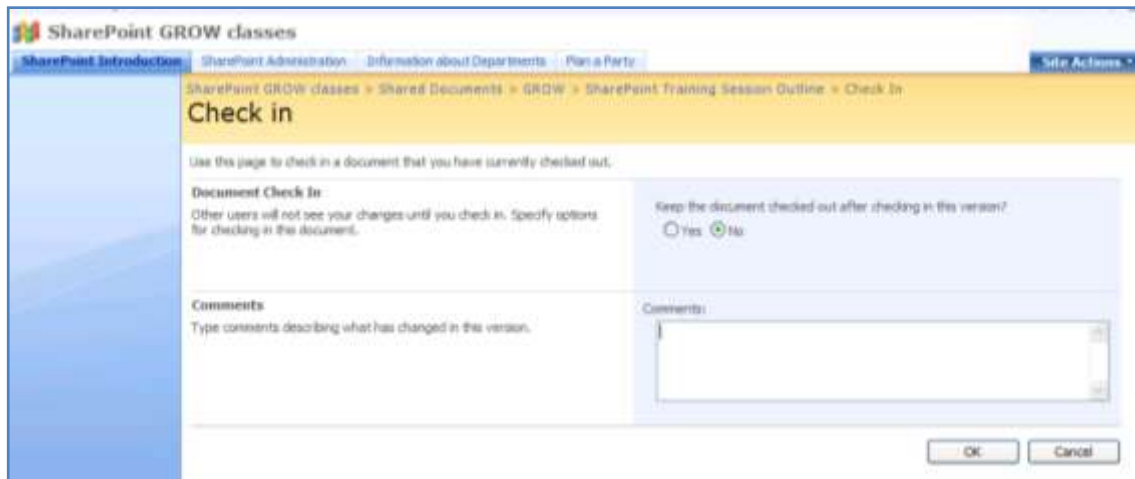
1.1 CHECK OUT AND EDIT A DOCUMENT

1. Navigate to the document.
2. Point to the file name, and click on the down arrow.
Click **Edit in Microsoft Office Word**.
3. Other selections you could make from the down arrow include:

- **Check Out** is an option if this has been enabled for the

document library. After you have checked out a document, changed it, and saved the changes, select **Check In** on the down arrow. When you make this selection, a window opens up, and you can add comments.

- Click **Alert Me** to receive e-mail alerts when the document has been changed.
- Click **Send To** to send someone a link to this document in an e-mail message.
- Click **Delete** to delete the document.



1.2 CREATE A NEW DOCUMENT

1. Navigate to the **Shared Documents** library. Click **New > New Document**. This will open up a new document in Microsoft Word.
2. Work on your document and save it. It appears in the Shared Document folder, with the word **!New** after it. Sometimes you need to press the refresh button on your browser for the document to appear.

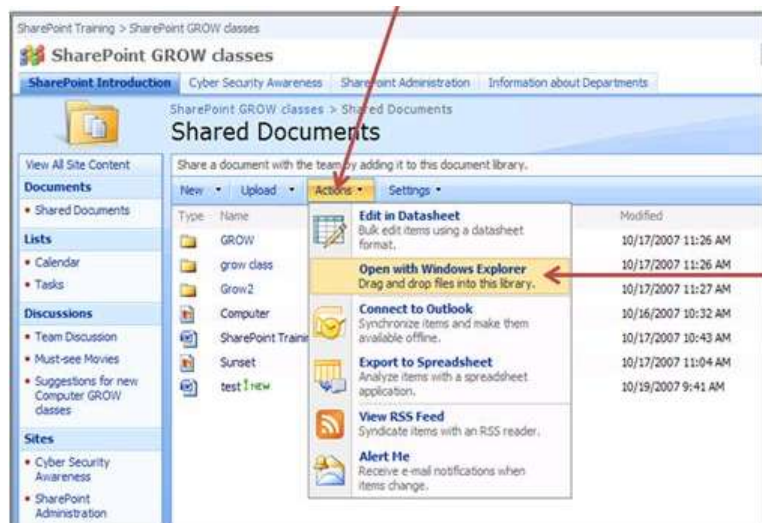


1.3 UPLOAD ONE OR MULTIPLE DOCUMENTS

1. Navigate to the **Shared Documents** library. Click **Upload > Upload Document** or **Upload Multiple Documents**. This will open up a new document in Microsoft Word.
2. Click **Browse** to locate the document, click **OK**.

1.4 MOVE, DELETE, COPY OR RENAME DOCUMENTS OR FOLDERS

1. Change to **Explorer View** to move, delete, copy or rename documents or folders. On the **Actions** menu, select **Open with Windows Explorer**.



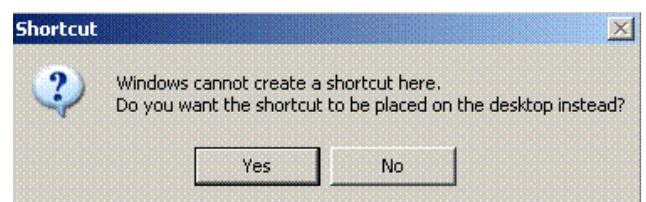
2. A new window will open up showing the files and folders in Explorer view. Drag documents or files to move them, and right-click to copy, paste, delete, or rename a file. Click X in the upper right corner to close the window to return to the SharePoint site.

1.7 RECOVER A DELETED FILE FROM THE RECYCLE BIN

1. Click on the **Recycle Bin** on the **Quick Launch bar**.
2. To select the document you want to restore, place a check mark beside it and click on **Restore Selection**.

1.8 CREATE A LINK/SHORTCUT TO A FOLDER OR DOCUMENT LIBRARY

1. Navigate to the SharePoint Document Library.
2. Click **Actions > Open with Windows Explorer**.



3. Right-click the folder you want a shortcut to.
4. > **Create Shortcut**.
5. Click **Yes** to place it on the desktop.
6. Rename it or move it to My Documents. (Favorites in Vista).

1.9 MAKE A NEW DOCUMENTS LIBRARY (IF YOU HAVE PERMISSION TO DO SO)

1. Click **Documents** in the navigation pane.
2. Click **Create > Documents Library**. Name it your first name.



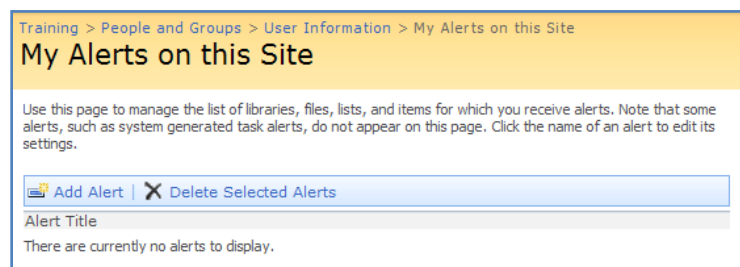
1.10 MAKE A NEW FOLDER

1. Click on **Shared Documents** (or the name of your new library) on the **Navigation pane**.
2. On the **New** menu select **New Folder**.
3. Name the folder.



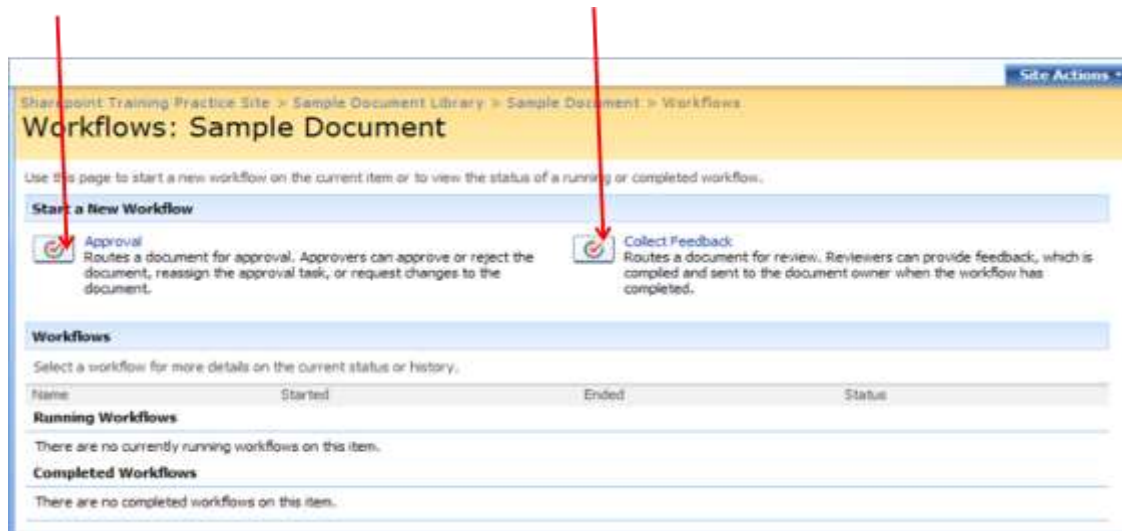
1.11 SET AN ALERT FOR THE DOCUMENT LIBRARY

1. Navigate to the **Shared Documents Library** where you want to set up an alert.
2. Click on the **Actions** down arrow > **Alert me**.
3. Make your selections for the type of changes you want to be alerted about, and how frequently you want to be alerted.
4. Manage your alerts:
> **Welcome Lastname, Firstname > My Settings > My Alerts > Delete or Add**



1.12 ROUTE A DOCUMENT FOR APPROVAL OR TO COLLECT FEEDBACK

Click the down arrow on a document > **Workflows**.

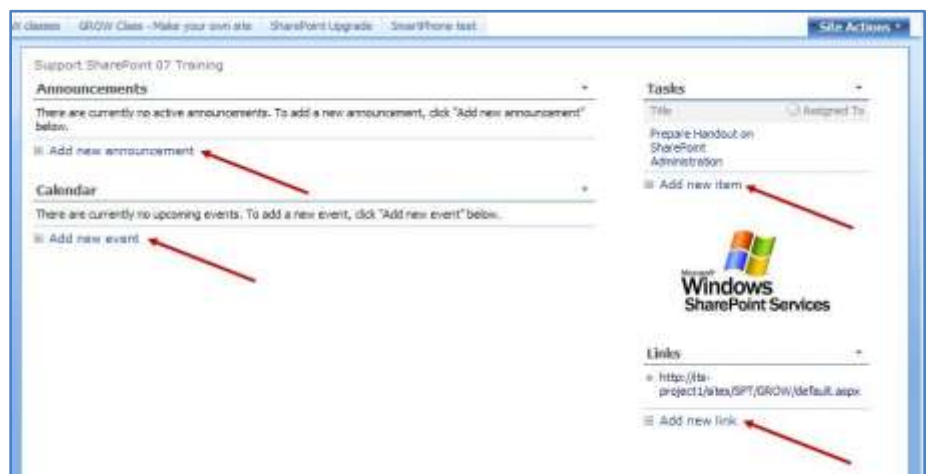


2. WEB PARTS

2.1 ADD AN ANNOUNCEMENT, AN EVENT TO A CALENDAR, A NEW LINK

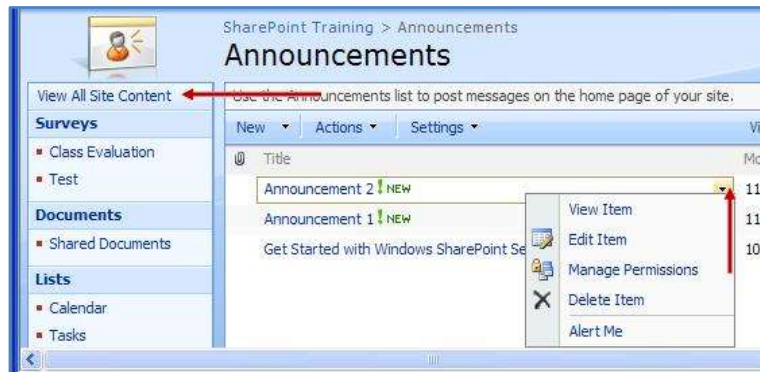
If you have Full control of a SharePoint site, you can modify the Web Parts.

1. Navigate to the site you want to modify.
2. Click on **Add new link** to add a link to a website or a different SharePoint site.
3. Click on **Add new announcement** to add an announcement.
4. Click on **Add new event** to add a new event to the Calendar.
5. Click on **Add new item** to add a new item to the Tasks.



2.2 MODIFY A WEB PART

1. Click **View All Site Content** at the top left of the **Quick Launch** bar.
2. Click on the Web part that you want to modify, for example **Announcements**.
3. A new window opens. Click on the down arrow next to one **Announcement** that you want to remove, and click on **Delete**.



2.3 CONNECT A SHAREPOINT CALENDAR TO OUTLOOK

Link the calendar to your personal calendar in Outlook so that you can view this information along with your personal calendar information.

1. Click **Actions > Connect to Outlook**.
2. Open Outlook and click on **Calendar**. View the SharePoint calendar under **Other Calendars**.
3. Click **View > View in Overlay Mode**, or **View Side by side**.

3. VIEW CONTACTS IN SHAREPOINT AND CONNECT THEM TO OUTLOOK

1. Click **Contacts** on the **Quick Launch** bar (on the left side of the screen.)
2. To export the Contact list from SharePoint to Outlook, click **Actions > Connect to Outlook**.
3. Open Outlook. Click **Contacts** in the **Navigation Pane** (left).
The SharePoint list will appear under **Other Contacts**. Use the Search box (top right) to search for a specific person.
4. Drag a contact to your Outlook Contacts.

4. CREATE OR MODIFY A TASK AND CONNECT IT TO OUTLOOK

1. Click on **Tasks** on the **Quick Launch** bar (on the left side of the screen.)
2. Click **New > Add a new item to this list**.
3. Give the task a title, assign it to a user (or users), assign a start and end date, and click **OK**.
4. Connect SharePoint tasks to Outlook by clicking **Actions > Connect to Outlook**.

