Quick Reference Guide

For DoIT-hosted SharePoint 2010 Webites

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Getting Started

Logging on to a SharePoint Site

1. Open **Internet Explorer**. IE Version 9 or higher is best, but you can also use Chrome or Firefox.
2. Type the address of your SharePoint site in the address bar.
3. Enter your SharePoint username* and password* in the login dialog box.

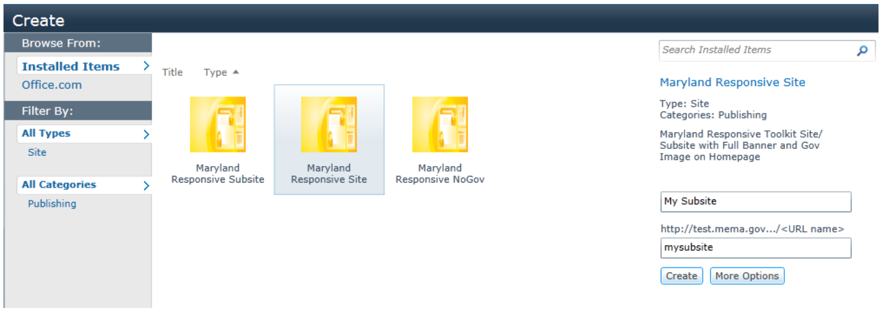
4. If your account is locked, the dialog box will only “blink” and nothing will happen. Locked accounts will automatically reset after 20 minutes; we recommend restarting your browser after 20 minutes and re-entering your account credentials.
5. * If you need to request a SharePoint account, or have any problems logging in to the SharePoint site, send an email to dlwebcom_doit@maryland.gov.

Changing your SharePoint Site Password

1. Navigate to https://pub.maryland.gov/sites/workspace. You can create a browser bookmark for this site, or for your convenience, there is usually a link called “Admin Workspace” in the left nav column of the root site.
2. Login again using your SharePoint username and password (this is a different site collection).
3. Use the CHANGE PASSWORD link in left column.

Create a New Site (Subsite)

1. You will usually start at the site’s root level to create a subsite – Under **Site Actions**, select **New Site**.
2. There are 3 different site templates to choose from; choose carefully – the icons looks the same, but the descriptions on the right explain the differences.
    a. **Maryland Responsive Site** – creates a site/subsite with full banner and gov image on homepage
    b. **Maryland Responsive NoGov Site** – creates a site/subsite with full banner and NO gov image on homepage
    c. **Maryland Responsive Subsite** – creates a subsite with slim banner and no gov image on homepage



3. Enter a Title (My Subsite Title) and a URL name (i.e. mysubsite).
4. Click **Create**.
5. Additional information about creating subsites is in the DoIT SharePoint 2010 Responsive Toolkit (https://pub.maryland.gov/sites/workspace/Shared%20Documents/2010-Responsive-Design-Toolkit-User-Guide.pdf).

Delete a Site (Subsite)

Warning: Deleting a site permanently deletes the entire contents of the site.

1. Under Site Actions, select **Site Settings**.
2. Click **Delete this site**. Read the steps carefully to remove the site and all of its content.

Grant Permission: Add users to a group

1. Request a new user account from DoIT Web Systems: firstname, lastname, email address
2. From Site Actions select **Site Settings**.
3. Select **Site Permissions**.
4. Click on the group name that will receive new members.
5. Click **New**, **Add Users**.
6. Either type user names or use the address book ( ) to add people to the group.
7. If you want to send a welcome email with a link to the site in it, verify that **Send welcome e-mail to new users** is checked.
8. Write a custom message to the new users.
9. Click OK.

Working with Documents

Create a New Library

1. On the Quick Launch Bar, click **All Site Content**.
2. Click Create .
3. Click on the type of library you want to create.
4. Enter the name and description.
5. Click Create.

Delete a Document

1. Check the check box next to the document name.
2. On the **Document** tab, click Delete Document .
3. Click OK.

Read a Document

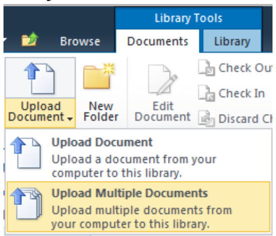
1. View All Site Content; navigate to a document library.
2. Click on the name of the document.
   Your document will open read-only or you will be asked if you want to check out the document.

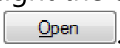
Upload a Single Document

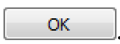
1. View All Site Content; navigate to a document library.
2. Select the **Documents** tab.
3. Click Upload Document
4. Click Browse... .
5. Highlight the desired document.
6. Click Open.
7. Click OK.

Upload Multiple Documents

(only works with Internet Explorer and MS Office)

1. Open any Document Library; select the Library Tools > Documents tab.
2. Click 

3. Click Drag File and Folders, or Browse for files instead.
4. Highlight the desired documents.
5. Click .

6. Click .

Working with Lists

Create a Custom List

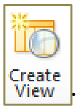
1. Click **Site Actions > View All Site Content**.
2. Click **Create**.
3. Click the **List** tab from the left panel section **Filter By**.
4. Select **Custom List**.
5. Enter the Name of the new list.
6. Click **More Options**. Change the Navigation default to <u>NOT display</u> on the Quick Launch.*
7. Click **Create**.

The list will appear with only the Title column. Use the following steps to add new columns:

8. Select the **List** tab.
9. Click **Create Column**.
10. Define the column and click **OK**.

*If you happen to overlook this step, the default setting will cause the new list to appear in the left column under a LISTS heading. To remove this, go to **Site Actions > Site Settings > Look and Feel > Navigation**. Select the Heading/folder icon Lists under Current Navigation and click **Delete**. Repeat this step to **Delete** the List Name from the Current Navigation.

Create a Custom List View

1. In your library or list, select the **List** or the **Library** tab.
2. Click on 

.
3. Select the desired view type.
4. Enter the choices for your view.
5. Click 

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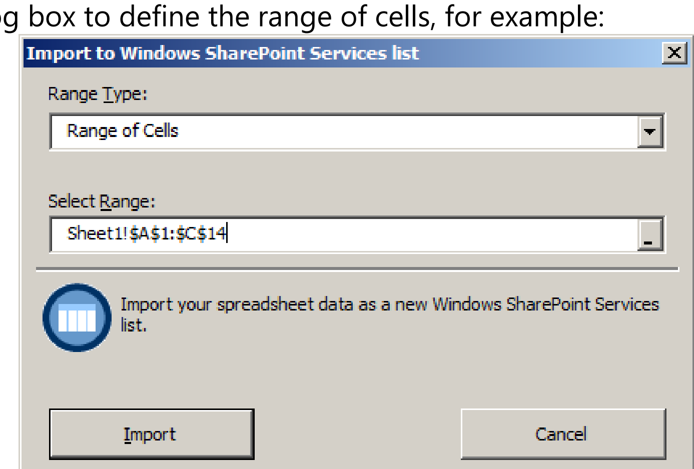
Create a List from an Excel Spreadsheet

1. Click **Site Actions > View All Site Content**.
2. Click **Create**.
3. Click the **List** tab from the left panel section **Filter By**.
4. Select **Import Spreadsheet**.
5. Click **Create**.
6. Type a list name using descriptive text.
7. Click **Browse** to open an Excel spreadsheet that has been prepared for import - make sure you have defined all column headings, and place the primary field as the first column. Choose the file to upload, and click **Open**, then click **Import**.
8. Enter your SharePoint account information at the prompt; in the dialog box, change **Range Type** to “Range of Cells”, clear the **Select Range** field, then select the cells in the spreadsheet behind the dialog box to define the range of cells, for example:



9. Click **Import**, and the list will appear in SharePoint with the column headings and records. The first column of the selected spreadsheet will appear as the primary field in the list with a default link to edit the list item.

Refer to “Add a List Web Part to a Page” in this guide for further instruction about displaying the list on a page.

Create a List from a List Template

1. Click **View All Site Content**; navigate to a list that contains columns and/or content that you want to duplicate.
2. Click the **List** tab; on the ribbon, click **List Settings**.
3. Under Permissions and Management, select **Save list as template**.
4. Enter a file name such as **sample-template**.
5. Enter a template name and optional description, using mixed case text such as **My Sample List Template**.
6. Check the box to include content (list items).
7. Click OK; you will see a message that the template was saved to the list template gallery. Click OK again; you will go back to the original list settings.
8. Click **All Site Content**; click Create .
9. Click the **List** tab from the left panel section **Filter By**.
10. Select **My Sample List Template**. (see Step 5)
11. Enter the Name of the new list.
12. Click **More Options**. Change the Navigation default to NOT display on the Quick Launch.*
13. Click **Create**.
14. The list will appear with the same columns and list settings as the original list you selected in Step 1.

   *If you happen to overlook this step, the default setting will cause the new list to appear in the left column under a LISTS heading. To remove this, go to **Site Actions > Site Settings > Look and Feel > Navigation**. Select the Heading/folder icon Lists under Current Navigation and click **Delete**. Repeat this step to **Delete** the List Name from the Current Navigation.

Export a List to Excel

1. **View All Site Content**; navigate to a list that contains records you'd like to export to a spreadsheet.
2. Click the **List** tab on the ribbon.
3. Click **Export to Excel**.
4. Click **Open** in the **File Download** dialog.
5. If prompted with a security warning, click **Enable**.
6. In Excel, select how the data should be imported.
7. Click **OK**.

Delete a List or Library

1. **View All Site Content**; navigate to a list or document library.
2. Click the **List** or **Library** tab; on the ribbon, click **List Settings** or **Library Settings**. List Settings
3. Under Permissions and Management, select **Delete this list**.
4. Say OK to the message "Are you sure you want to send this list to the site Recycle Bin?"

Working with Pages

Create a New Page

1. Navigate to the section where the page belongs.
2. From the Site Actions menu, click **View All Site Content**.
3. Navigate to the **Pages** library; select the **Library Tools > Documents** tab.
4. Click New Document.
5. Enter the page **Title** using mixed case text (i.e. "My Page"); **Page Description** is optional.
6. The **Page URL** will automatically populate from the Title you entered; change this as desired to a compact page name like *mypage*.aspx.
7. Select a page layout from the list. Refer to the DoIT SharePoint 2010 Responsive Toolkit for descriptions of the different page layouts (https://pub.maryland.gov/sites/workspace/Shared%20Documents/2010-Toolkit-User-Guide.pdf).
8. Click Create.

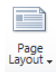
Delete a Page

1. Check the check box next to the Page name.
2. On the **Document** tab, click Delete Document.
3. Click OK.

Restore a Deleted Page or Document

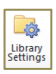
1. Go to Recycle Bin (look on the lower left of **All Site Content** screen).
2. Select the item by checking the box.
   You will only see items that have been deleted by you.
3. Select **Restore Selection**.

Change a Page Layout

1. Open a page to **Edit** mode.
2. Click the **Page** tab on the Ribbon.
3. Click the **Page Layout** button 

.
4. Select a new page layout.
   *NOTE: Some content could be lost if the selected page contains content in content areas that are not displayed in the new page layout. Refer to the DoIT SharePoint 2010 Responsive Toolkit for images of the different page layouts (*https://pub.maryland.gov/sites/workspace/Shared%20Documents/2010-Responsive-Design-Toolkit-User-Guide.pdf*).*

Turn on Versioning for a Library

1. Select the **Library** tab.
2. Click 

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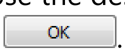
3. Under **General Settings**, click **Versioning Settings**.
4. Choose the desired versioning settings.
5. Click 

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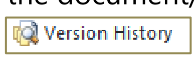
See Version History of a Page

1. Check the check box next to the document/page name.
2. On the **Document** tab, click 

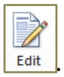
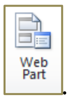
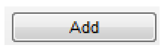
.
3. To read a previous version, click on the date and time the version was created.

View Who Has a Page Checked Out

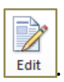
1. From the Site Actions menu, click **View All Site Content**.
2. Navigate to the **Pages** Library
3. Locate the page in question.
   The user who has the page checked out will appear in the "Checked Out To" column.

Working with Web Parts

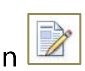
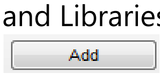
Add a Web Part

1. Select the **Page** tab.
2. Click .
3. On the page, click where you want the web part to appear. Web parts can be added to content areas OR web part zones in the branded page layouts.
4. Select the check box of the web part or parts to add.
5. Select the **Insert** tab.
6. Click .
7. Select the web part and click .

Remove Web Parts

1. Select the **Page** tab.
2. Click .
3. Click the  on the web part.
4. Select .
5. The web part will be removed from the page.

Add a List Web Part to a Page

1. Open the page where you want the list information to display; click the **Edit** shortcut button .
2. On the page, click where you want the web part to appear - web parts can be added to <u>content areas</u> OR <u>web part zones</u> in the branded page layouts.
    a. If you want to add to a <u>content area</u>: click inside the content area, then **Insert** from the Editing Tools tab. Click .
    b. If you want to add to a <u>web part zone</u>, click **Add a Web Part** in any webpartzone on the page layout.
3. The Lists and Libraries web parts will appear first; select the list you want to display on the page and click .
4. The default list view will appear; select **Edit Web Part** from the dropdown on the web part header. The screen will blink and the Edit Panel will appear on the far right of the browser – drag the bottom scroll bar to the right to bring the panel into view.

5. Click **Edit the current view** to make the following changes as applicable, then click **OK** to close the Edit View screen:
    a. In the **Columns** section, check the Display box next to any columns you don't want to display – usually Attachments and the [Primary field name] (linked to item with edit menu) should be unchecked. Other columns that are used for sorting or grouping may be unchecked as needed.
    b. Check the box to display the [Primary field name] column WITHOUT links. Change the Position from Left to 1.
    c. In the **Sort** section, select a column to sort the records.
    d. In the **Tabular View** section, uncheck the box Allow individual item checkboxes.
    e. In the **Group By** section, select a column to display the records by Groups.
    f. In the **Style** section, select Newsletter to display a line between list items, or Shaded to display shading on alternate rows of list items.
    g. In the **Item Limit** section, change the number of items to display, especially if your list has more than 30 list items.
6. Open the page to **Edit** mode again; select **Edit Web Part** again.
7. Change the **Toolbar Type** to No Toolbar.
8. Click **Appearance**, scroll down through the settings, change **Chrome Type** to None.
9. Click **OK** to close the Edit Panel; **Save & Close** to preview the list display on your page.