Introduction to SharePoint

Introduction

SharePoint allows users to collaborate on shared documentation, discussions, tasks, calendaring, and links.
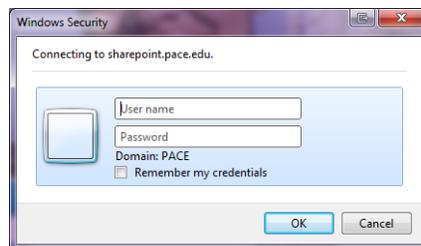
How to Log In

To log in your SharePoint site:

- go to http://sharepoint.pace.edu/sites/***yoursitename*** (i.e.; http://sharepoint.pace.edu/sites/helpdesk)

   Note: If you are accessing SharePoint from off campus, you must first VPN to Pace's network.

A *Windows Security* dialog box appears.

- type ***pace\your MyPace Portal Username*** in the **User name** field (e.g.: pace\jsmith)
- type ***your MyPace Portal Password*** in the **Password** field

The Home page of the SharePoint site displays. On the Home page you will see a section for *Libraries*, *Lists*, and *Discussions* on the left panel. In the center will be a Welcome message and *Shared Documents* section.
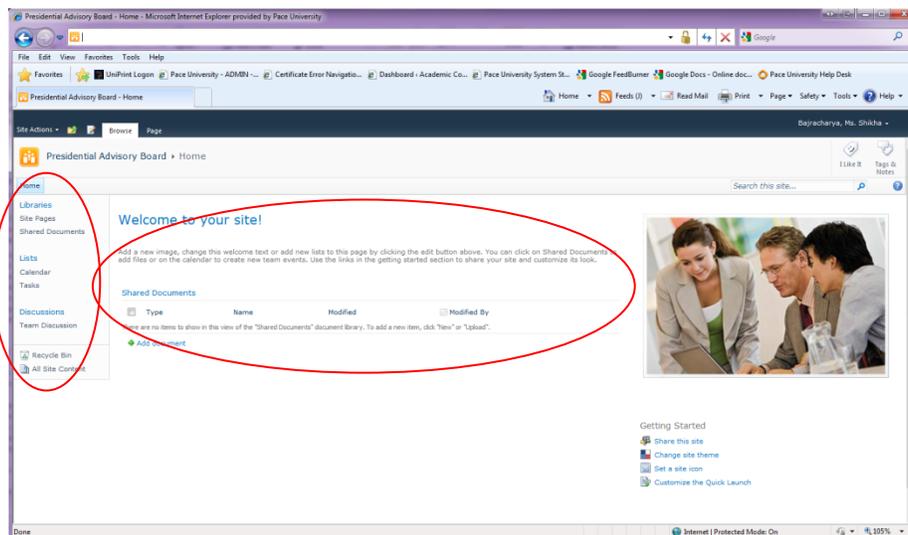
Under **Shared Documents** you will see all the uploaded documents.
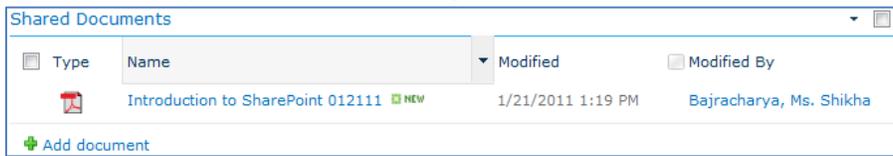
Setting Alerts

You can set up Alerts for this folder where you will receive an alert any time items are modified, added, and/or deleted.
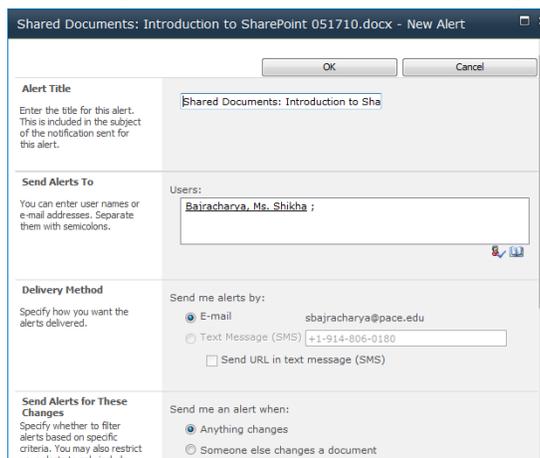
To set Alerts:

- select **Shared Documents** under **Libraries** in the left pane and or select a file under **Shared Documents** in the middle section
- click **Actions** and select **Alert Me** next to the file you want to be alerted for
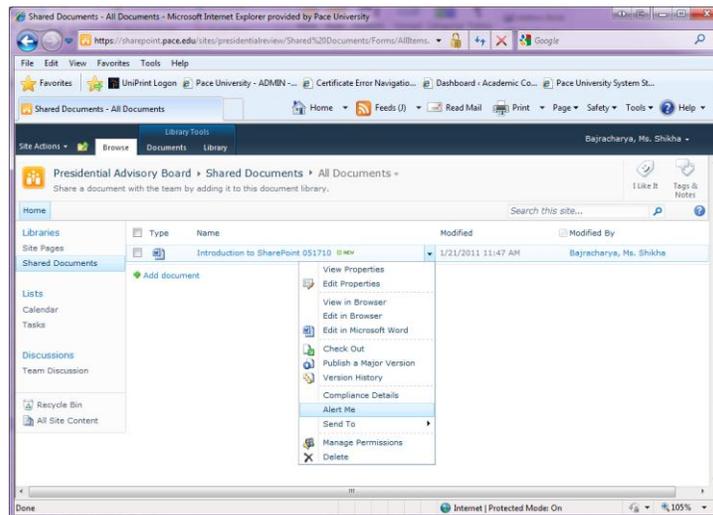
You can then set your options.

- create a title for this alert
- select the radio buttons for your desired notification settings and click **OK**

Editing a Document

To Check Out Documents for Edits

Checking out a document will lock the document so multiple people cannot make edits at the same time. It is standard practice to check out the document first. When a document is checked out you will see the icon change to display a small green arrow in the bottom right corner of the icon ![icon]. When this icon is displayed it means that someone has checked out the document to edit.
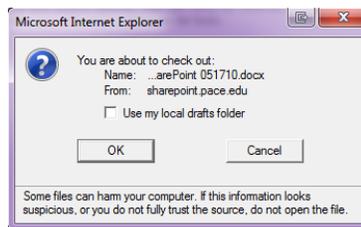
To check out a document:

- click the down arrow ![arrow] next to the desired file name
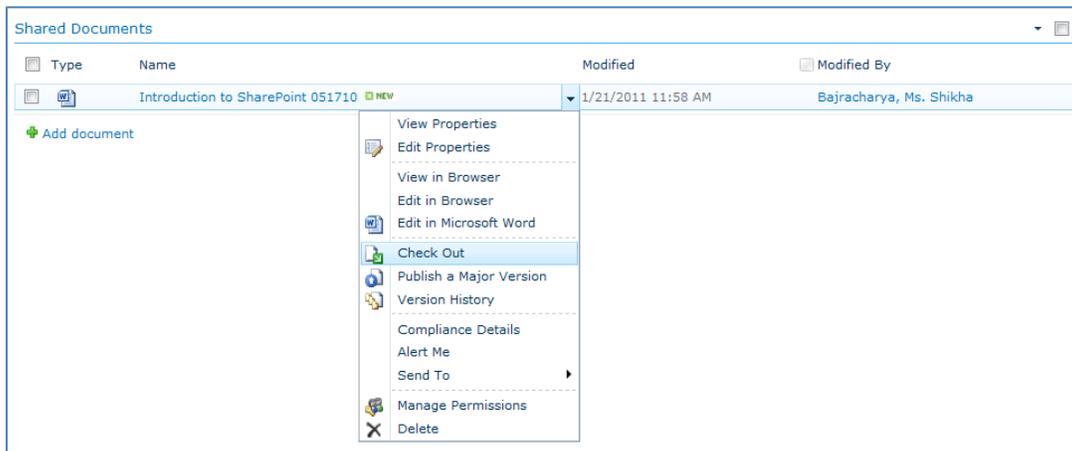
- click **Check Out**

The following textbox displays.

- click **OK**
- click on the file link to view the file within the browser

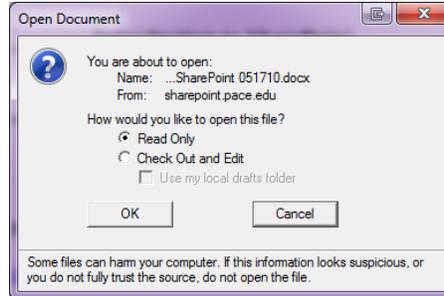There are two options when deciding to edit files.

Option 1: *Edit in Browser*

- click on ![Edit in Browser] to edit the file within the browser
- make your changes and click **Save** ![save]
- click either ![popout] to **Pop-out** or ![close] to **Close** the document

Option 2: *Open in Word*

- click to pull the file out of the web

When you select **Open in Word**, two options appear.

Since you have already Checked Out this document, you can select **Read-Only** and click **OK.** The selected file will now open separately in the application it was created in.
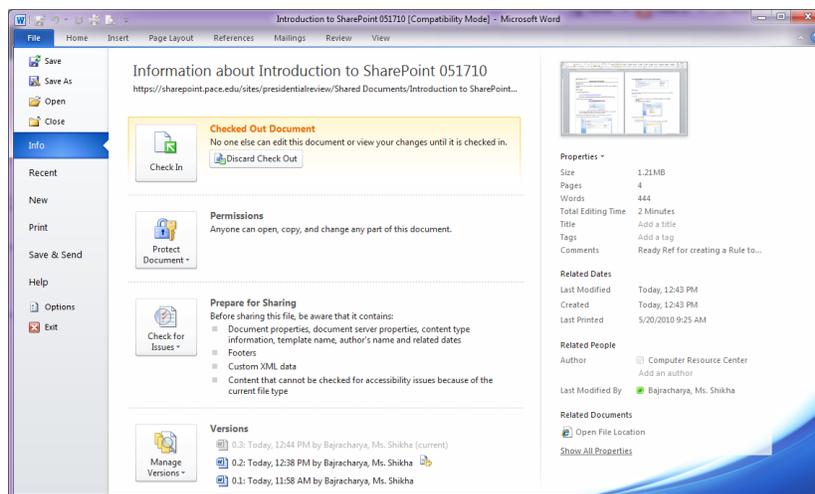
- make your desired edits and **Save** changes often as you work

When done, you must check-in your work before others can make edits or view your changes.

To Check In Documents after Edits

You must check in your documents after making changes in order to allow other users to check out the document.

- click **File** and select **Info**

Note: Make sure to only check out documents that are not currently in use. Otherwise you may experience loss of data when trying to save your changes to a document that is currently checked out by another person.

- click **Check-In**

You may select the Version Type and enter any comments for the version you are checking in using the *Check-In* dialog box.
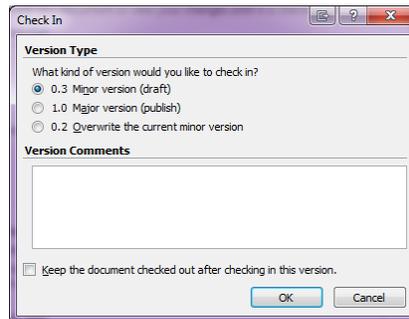
Note: Do NOT check the box next to "Keep the document checked out after checking in this version."
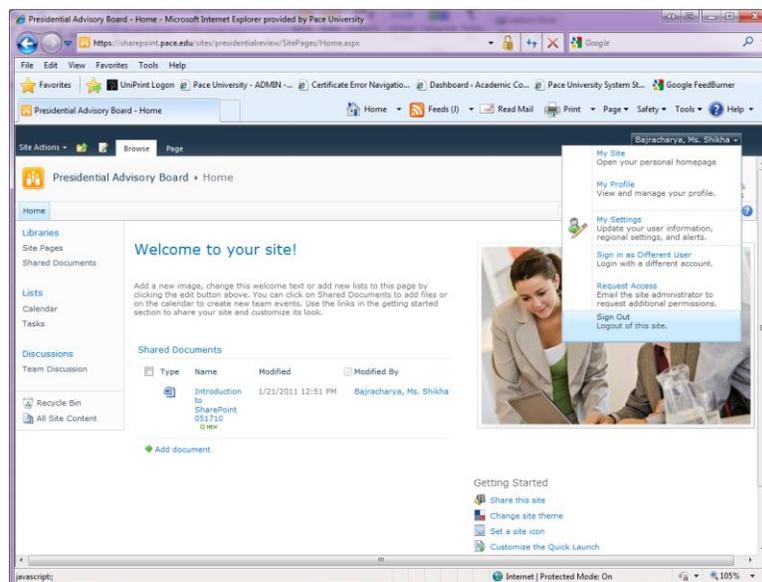
- click **OK**

The document will remain open with a new message at the top, "**Check Out Required, To modify this server document, you must check it out.**"
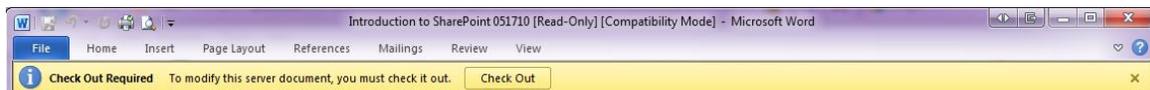
- click **X** to close the document

Signing Out of SharePoint

- click the down arrow next to your name in the upper right hand corner and select **Sign Out**

A dialog box appears asking, "**Do you want to close this window?**"

- click **Yes**