Using SharePoint for team collaboration

*The information contained in this guide pertains to all Strategic Plan sites. Your site may look slightly different than the screenshots presented. If you have further questions about SharePoint, please send all comments/questions/concerns to portals@ecn.purdue.edu.*
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Navigation

How to navigate throughout SharePoint
These are the navigation areas. You will use these two areas to browse through the various sites of the Purdue Engineering Strategic Plan site.
Clicking on the link in bold, Remote Connections, will take you to a page that lists all of the Adobe Connect links for every Strategic Planning site/group.

Clicking on the Virtual Meeting link will take you to the Adobe Connect site of the strategic area/team site that you are current at.

Clicking on the Teleconference link will take you to a page that lists all of the teleconference phone numbers.
Clicking on Public Documents will take you to the main Strategic Plan website. Documents in this folder are visible to public (anyone).

Clicking on Strategy Area Documents Shared will take you to your site’s shared document folder. This is viewable by all Strategic Plan members.

Clicking on Strategy Area Documents Private will take you to your site’s private document folder. This is only viewable by the members of that team/strategy area.
Clicking on the Calendar link will take you back to the calendar that is located on the main Strategic Plan site. The calendar has individual views for each team/strategy area.

SharePoint stores deleted items for up to 30 days. These items can be retrieved by clicking on the Recycle Bin link.
This navigation area is known as the “breadcrumb.” This will show you exactly where you are within the site. You can use this to go up one level or all the way to the main site. This is very helpful when you are not sure where you within the site.
Managing Documents

Adding, Renaming, Deleting, and Moving Documents
1. Click on the name of the folder (p.1)
2. Click the word “upload” to upload a single document or click on the little downward arrow to have the option of uploading multiple documents (p.2)
3. The next screen is fairly self-explanatory, however if you have any issues with the upload process, send an email to portals@ecn.purdue.edu
1. Hover your mouse in the area outlined in red above
2. Click on the downward arrow that becomes visible, outlined in blue above
3. Click Edit Properties, outlined in green above
4. Enter a new Name for the document and click OK.
**Entering a Title is optional. Note that when the document is viewed in the folder, it is the Name that is going to be visible to people.
Deleting a Document from a Folder

1. Hover your mouse in the area outlined in red above
2. Click on the downward arrow that becomes visible, outlined in blue above
3. Click Delete, outlined in green above
4. You will then be asked if you are sure you want to delete this item. Remember, there is a recycle bin that stores deleted items for up to 30 days.
At this time, there is no easy way for end users to move documents. If you have a lot of documents that needed moved, contact ECN at portals@ecn.purdue.edu and we will move them for you. If you only have a couple documents that need to be moved, you will have to delete them from their original location and then re-upload them to where you want them.
Miscellaneous

Other helpful tidbits of information
The list of documents (each under their respective heading) provide an easy way for team members to access important documents. This list of documents is automatically populated, allowing instant access (from each team site) to new documents as they are added.
Use the list of team members, located in the bottom right of the page, to view who has been given access to that particular site. If you notice any errors, please notify portals@ecn.purdue.edu.
The calendar is a single calendar that houses all events from all sites. There are filters for each view that will show only the events for a given team. Events that don’t pertain to a single team, should be filed under “------------------OTHER------------------”. These events will then show up in the Public Events view.
1. Click the name of the current view selected, outlined in red above.
2. The area outlined in blue will appear showing you the list of available views.
3. Click on the team who’s calendar you wish to see, such as the area outlined in green above.
Alerts are very convenient and can be enabled on almost every folder, list, discussion board, etc. in SharePoint. Alerts allow people to be notified when a new item, for example, is added to a document folder.

To configure alerts:
1. Go to the folder/calendar/discussion board you want alerts set up on
2. In the toolbar, click Actions > Alert Me

The next page will discuss alerts in more detail.
After clicking on “Alert Me” you will see this page (it has been cropped in this screenshot). A very nice feature of the “Alert Me” function is that it allows a single person to add their entire team’s group into the people to alert. That way each person does not have to click on the “Alert Me” link for every item they want to be alerted about.

Carefully read through all the options on the page and once finished, click OK. Remember, you can put as many people as you want in the Users field. To help find people, you can click on the little Address Book icon just below the users box.

If you have any questions about this process, please send an email to portals@ecn.purdue.edu.
Troubleshooting

Fixes for the common issues
Troubleshooting

• If the screenshot you see in this guide references a button that you do not see (such as the Upload button in the folder toolbar), make sure that you are signed in. When following this guide, you want to make sure you are logged in at all times.

• If you are signed in, and still do not see some of the buttons, it could be due to the browser that you are using. SharePoint works 100% in Internet Explorer. Mozilla Firefox and Safari users will have limited functionality. For example, the Upload Multiple documents option is only available in Internet Explorer. Before submitting a ticket to portals@ecn.purdue.edu try performing the action in Internet Explorer.

• For more training, there is an automated self-paced training site set up for anyone to use. It is located at https://sharepoint.ecn.purdue.edu/training/default. It offers videos, user interactions, and text articles for performing various tasks within SharePoint. Feel free to browse through the tutorials available.

• When logging in to a SharePoint site, use just your username. You do not need to put ECN\ or ONEPURDUE\ in front of your username.

• Always send questions regarding SharePoint to portals@ecn.purdue.edu.