



Introduction to SharePoint

QEMRF Collaboration Site

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Introduction

For any organisation, managing the documents, lists, contacts and calendars associated with that organisation can be a nightmare. This is doubly so when the organisation consists of people who are geographically separated and don't have access to a centralised computer network.

The Queensland Emergency Medicine Research Foundation (QEMRF) are exactly this type of organisation!

To make it easier to manage QEMRF's documents etc, they have commissioned the creation of a collaboration site using software from Microsoft called SharePoint. This document explains what this means to you, and how you can use it to achieve the basic jobs you will need to perform.

What is a Collaboration Site?

Despite a grandiose title, it is really just a web site that allows people to share access to documents and other information. Throughout this document we will refer to the site as "the portal", as that best described what it is.

One of the key aspects of this site is that it is designed to allow people to work on documents collaboratively. Documents can be created by one person, reviewed by another, and edited by yet more people. It is even possible to keep multiple versions of documents so that you can trace the changes that have occurred.

So What Can I Do With It?

This guide provide you with step by step instructions for the most common activities people will perform on the site. These are:

- Accessing the Portal
- Navigating Around the Site
- Viewing Documents
- Creating a New Document
- Editing an Existing Document
- Uploading Documents to the Site
- Sending Documents to Other People

What Do I Need to Start?

Firstly, you need to be working with a computer with access to the Internet. It doesn't matter if the computer runs Windows, Vista, Linux or is a Mac.

You will also need access to applications that can edit Microsoft Office files like Word documents and Excel spreadsheets. The most obvious choice is Microsoft Office itself, preferably versions 2003 or 2007. If you don't have either of these application suites, you can still work with the files, but there will be some differences in what you can do and how easily you can achieve things.

Accessing the Portal

The portal is found at the following Internet address (URL): <http://portal.qemrf.org.au>. To access the site, follow this hyperlink or type the address into an open browser window.

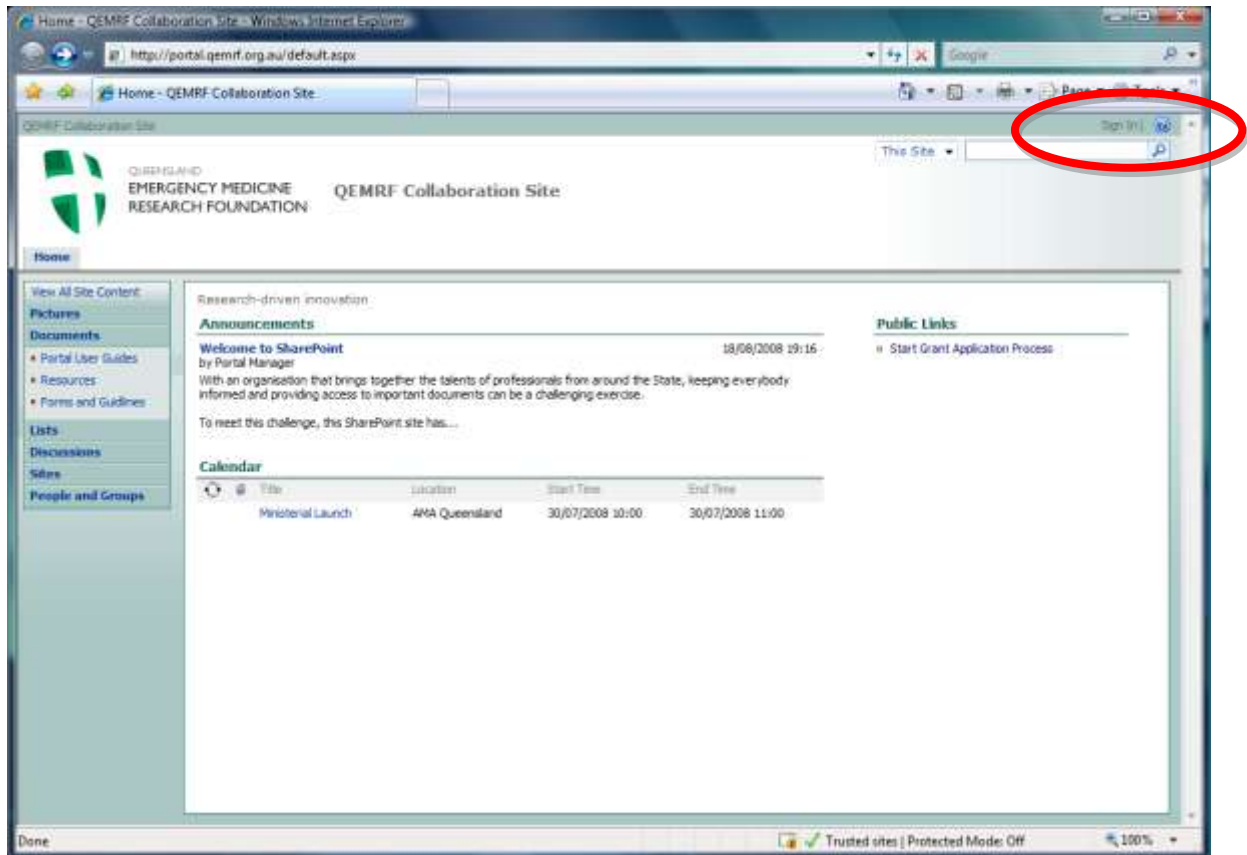


Figure - The public access portal screen

The portal has a front end that is publicly accessible. Access to secure content is available only by people who have been granted access. You will have received an e-mail when QEMRF added you to the site that contained details of user ID and password.

When you want to access the portal, click the “Sign In” link in the top right-hand corner. You will then be asked for the user ID and password, as shown in Figure . Note that all user IDs are in the form “hosting\xxxxx”, where “xxxxx” is your name. The “hosting\” bit is required because of how the portal has been set up.



Figure : Logging in to the QEMRF portal

Click OK to continue to the home page of the site.

Navigating Around the Site

Figure shows what the site looks like when you first log in.

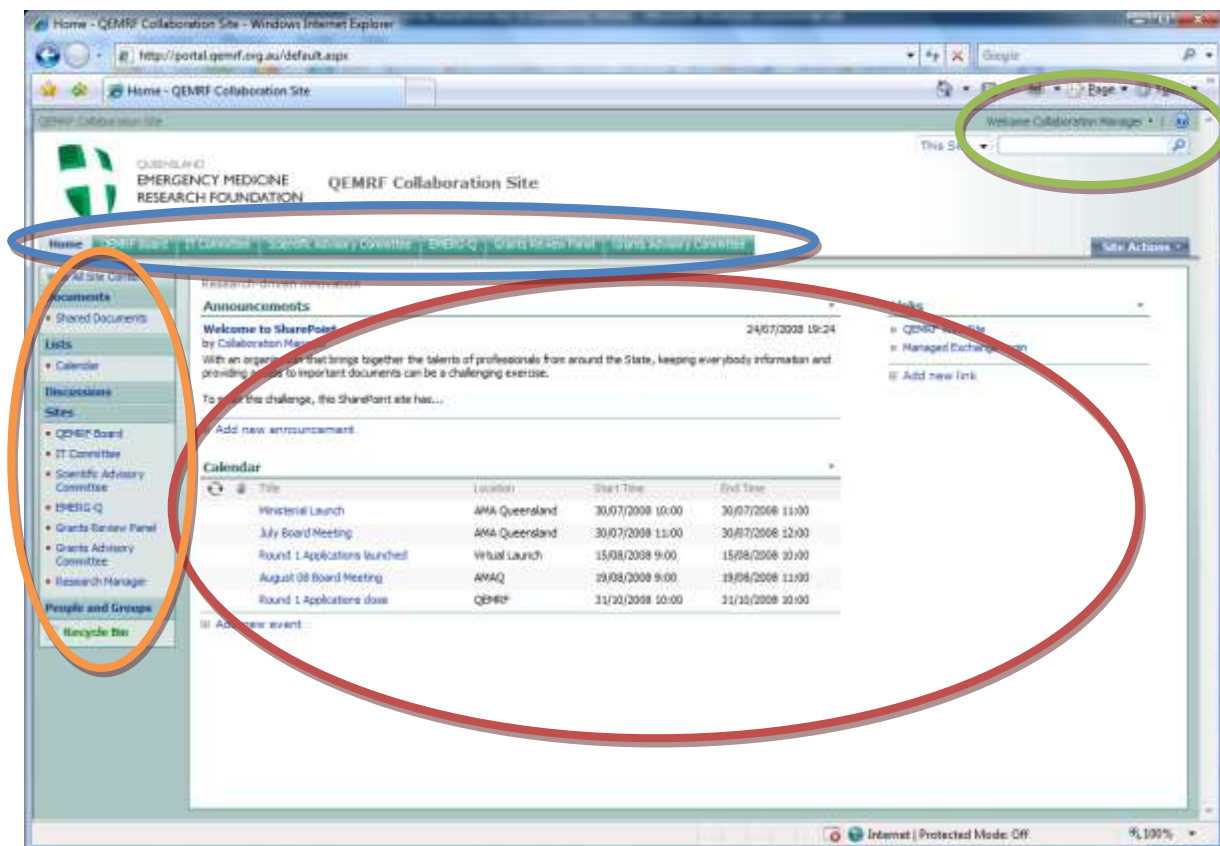


Figure : The Home screen for the QEMRF Portal

Sites

Across the top of the page (below the banner, and circled in blue) is a list of buttons that provide access to the various sites that make up the portal. Each site (sometimes also called a workspace) contains its own content and is accessible only by users allocated to it. Use these buttons to move between the various sites.

Content List

Down the left-hand side of the page (circled in orange) is a list of content items in the selected site. This can include libraries of documents, lists of data, and child sites. Click the required content item to open it in the main part of the page.

Content

The main part of the page (circled in red) contains the content that you have selected. Usually it is a list of things, such as documents, tasks, contacts or the like. The main page of each site contains a set of panels (also called “web parts”) that show specially selected content for that site.

Searching & Help

There is a search box in the top right-hand corner (circled in green) that can help you quickly find items and documents by keyword search. And don't forget the question mark icon – this opens the help system.

Viewing Documents

Almost the first thing you will do on the portal is open a document to have a look at it. In this situation you are not planning to edit the document, just look at it and maybe print it.

Figure shows how this is done. Having selected a document library from the list at the left, we can see a list of documents (and maybe folders) within that document library. By moving the cursor down the list, each document will be highlighted in turn, and the title will show as a hyperlink.

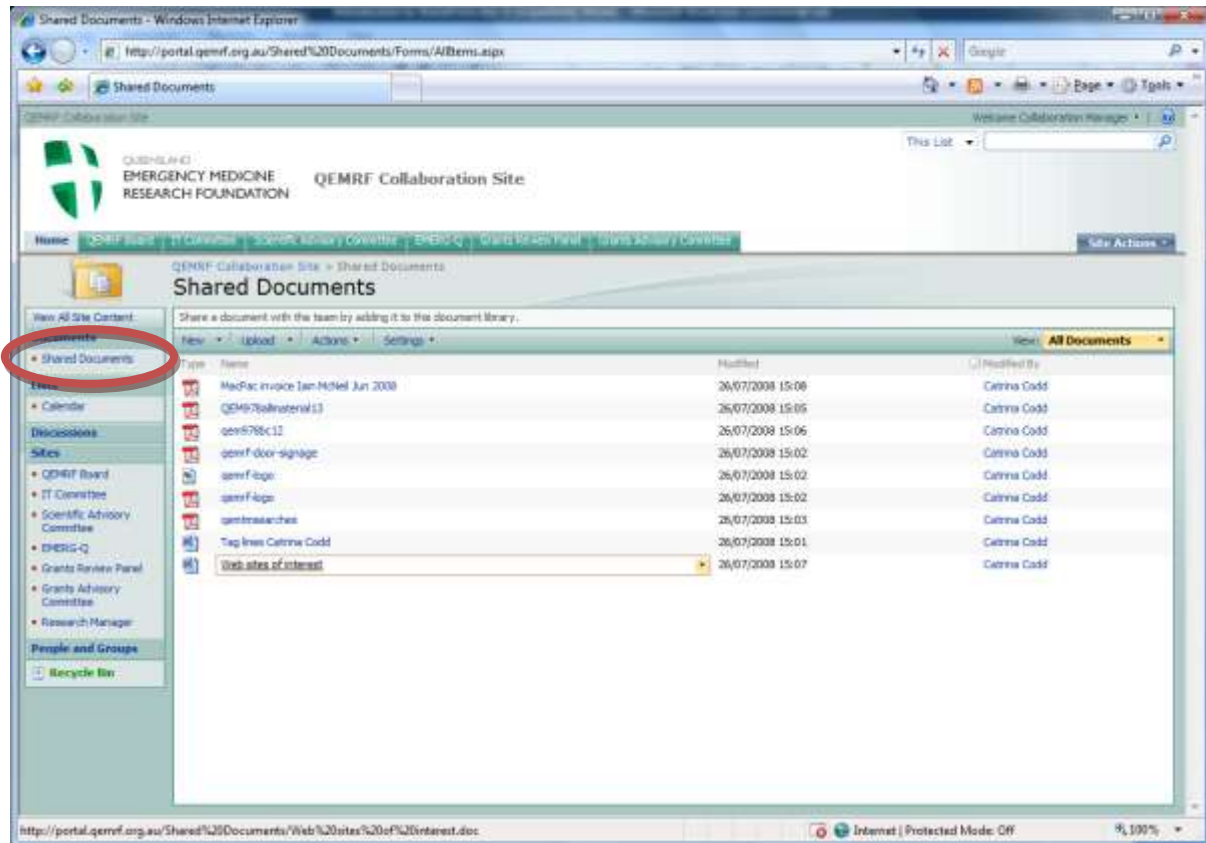


Figure : Opening a document from the portal

Assuming we are interested in the file “Web sites of interest”, we can click on it to open the file. You may then be asked whether you want to open the file in read-only or edit mode (this only applies to users of Microsoft Office 2007), as shown in Figure below. For our purposes now, we would select read only mode.



Figure : Choosing the mode to work with

The document will then be opened (in read-only mode) in the application used to view that file. What has actually happened is that the file has been downloaded from the site into a temporary working folder. When you are finished, you can close the application and return to the portal.

Editing an Existing Document

The next obvious option would be to edit a document that already exists on the portal. To do this, you can select the option to edit the document shown in Figure previously (if you are using Microsoft Office 2007), or you can use the document menu shown in Figure below.

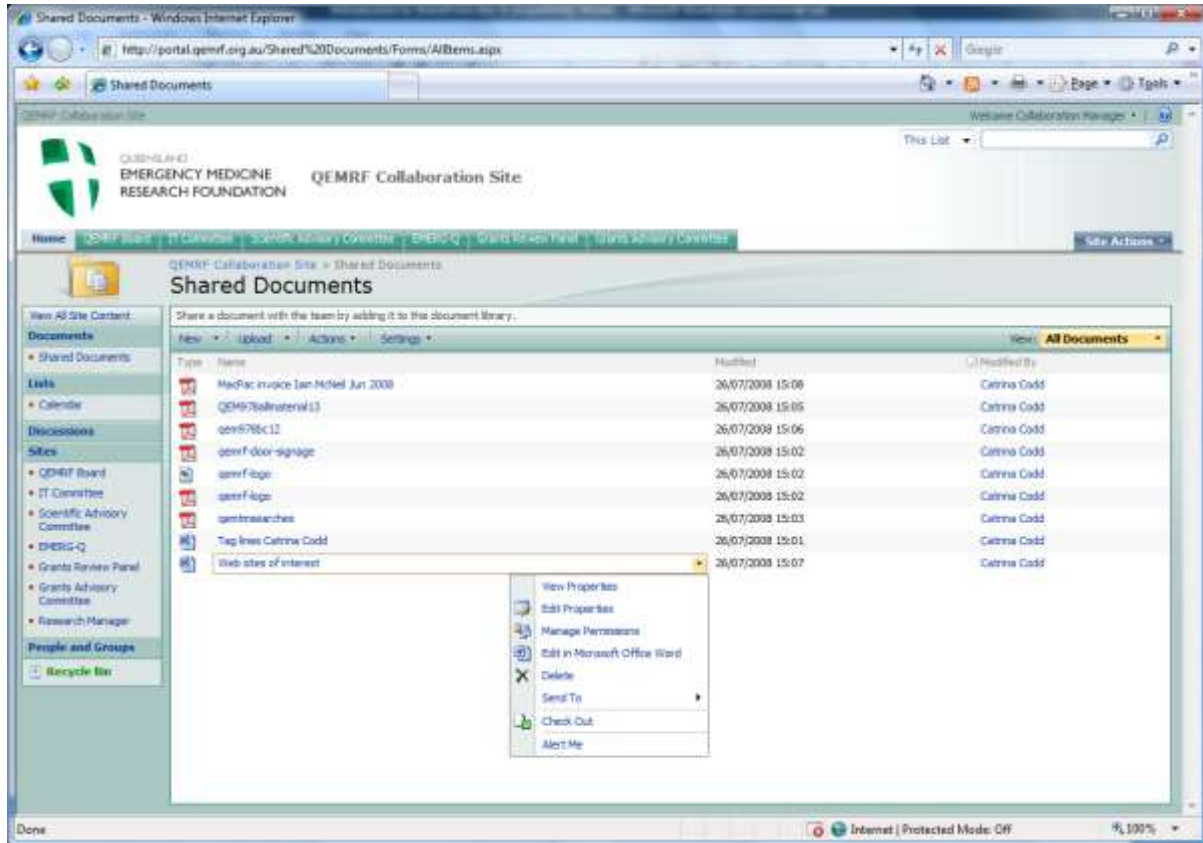



Figure : Selecting the edit open from the document menu

The document menu pops up when you click in the frame that surrounds the selected document (or the down arrow at the right). This allows you to activate all sorts of functions, but right now we are interested in the option to edit the document.

The document will then be opened (this time in edit mode) in the application used to edit that file. Once again, what has actually happened is that the file has been downloaded from the site into a temporary working folder on your computer. When you are finished, you can close the file and you will be asked to save it. Doing so will return you to the portal.

Note that if the administrator has activated versioning, every time you edit a file a new version is created on the server. This is a useful facility when you need to keep track of complex documents edited by several people.

Creating a New Document

 Note: if you are not using Microsoft Office 2003 or later, you cannot do this – you will have to create the document on your computer and upload it as described on page 8.

One of the most common tasks is creating a new document. To do this, select a document library from the list on the left, and click the New button on the toolbar (if you click the down arrow next to the New button, you will be able to select from creating a document and creating a folder, as shown in Figure).

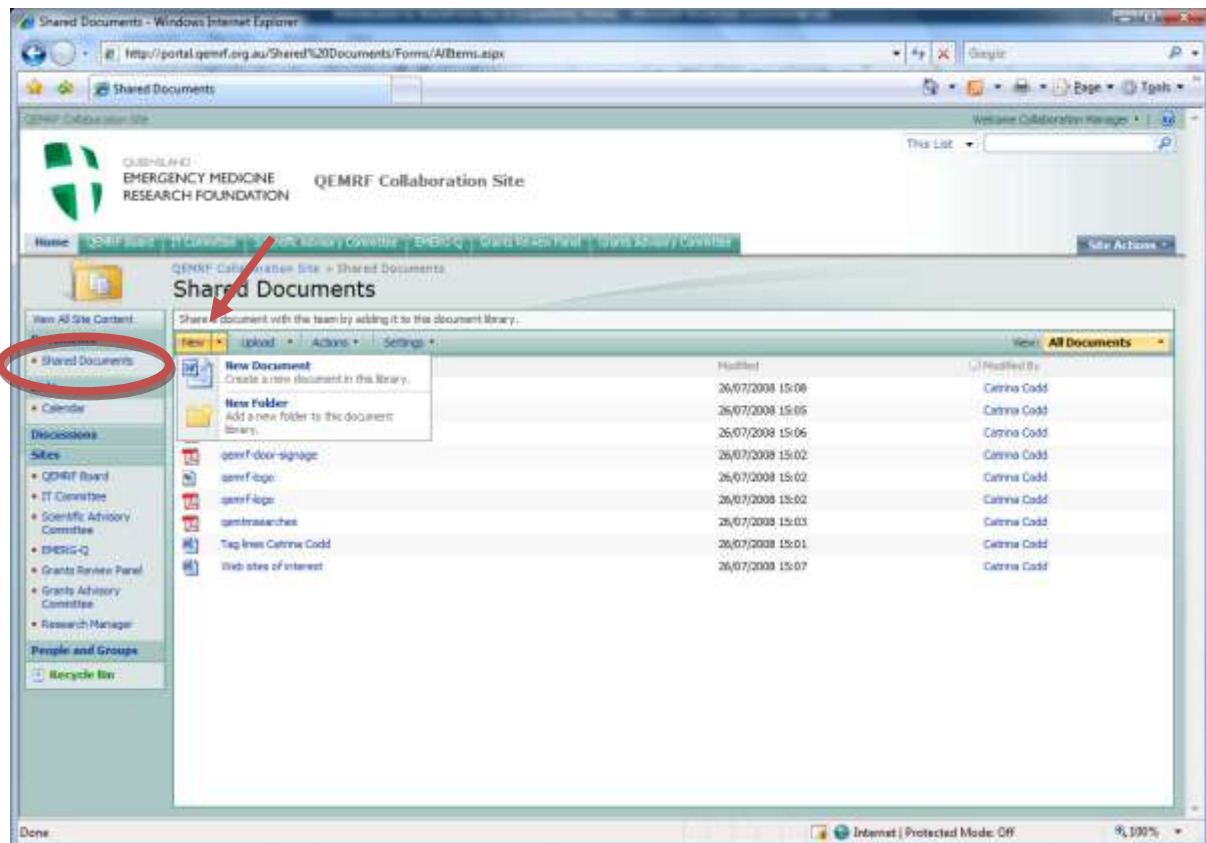


Figure : Creating a New Document

Depending upon your computer settings you may receive a warning about opening files from the Internet. You may also be asked to reconfirm your user ID and password.

The appropriate Microsoft application (usually Word) will then open, and you can add the text to the document that you require.

When you are finished, close the document (usually File > Close in the menus), and you will be prompted for details like the file name to be used.

That's it – you have created a document on the portal!

Uploading Documents to the Site

Sometimes you will have documents that have been created locally on your computer, or have been e-mailed to you by other parties. In such cases, you can upload one or more documents to the portal.

Figure shows what happens when you click the down arrow next to the Upload button.

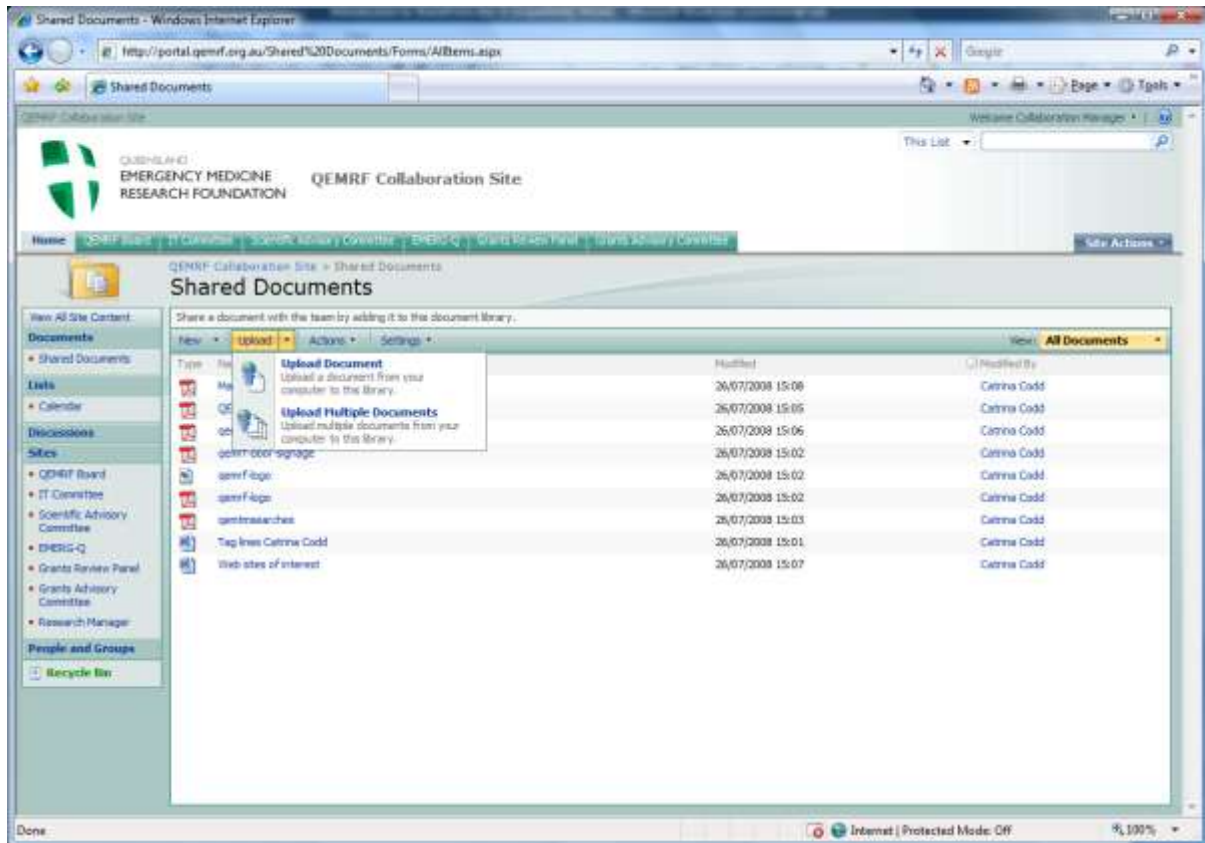


Figure : Uploading documents to a document library

Selecting 'Upload Document' for instance will ask you to nominate a file, as shown in Figure . You can use the Browse button to locate the appropriate file on your computer, and then click OK to start the upload process.

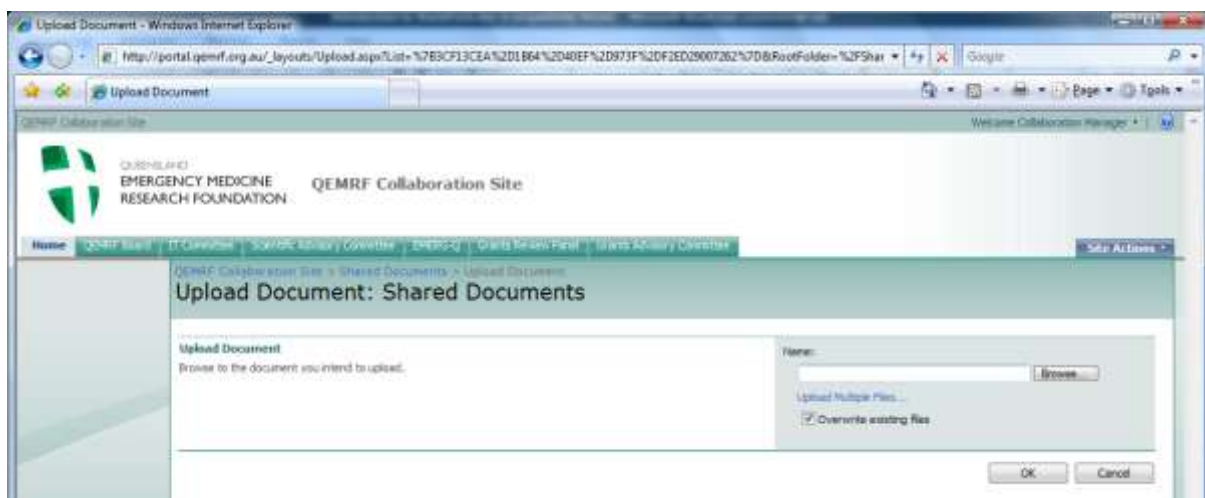


Figure : Uploading the files

Sending Documents to Other People

Given that the QEMRF portal is a collaboration site, you might ask how it is going to help you get documents to people. There are two ways.

Sending Links to Other Portal Users

If the person you are sending the document to is another QEMRF portal user, then there is a really easy way to get the document to them. Figure shows how to use the document menu to send a link to the document to the other person.

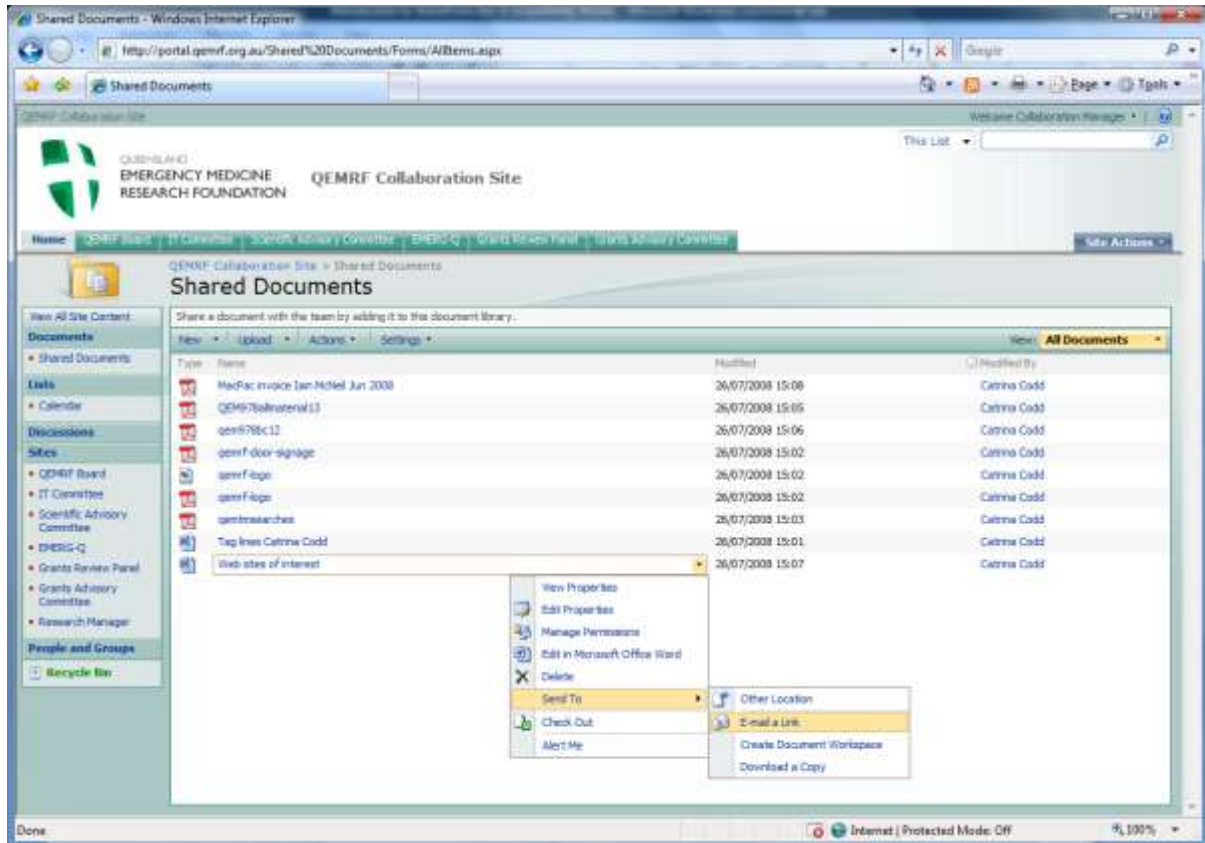


Figure : E-mailing a link

This will open your e-mail client and create a link to the document in that e-mail message. You can see the result in Figure .



Figure : How the e-mail gets sent

When the other person gets the e-mail, they can click on the link to open the document.

Sending Documents to People Who Aren't Users

If the person you are sending the document to isn't a portal user, they won't be able to open the document using the method described above. Instead, you can use the "Download a copy" option on the "Send to" menu. This will download the latest version of the document to your computer, and you can then use normal e-mail to send that file to the other person.