NIDA
NATIONAL INSTITUTE ON DRUG ABUSE

A Quick Reference Guide to Using SharePoint at NIDA

Overview

What is SharePoint?

SharePoint is a Web-based collaboration tool which allows information and document sharing. SharePoint helps users create a central location where everyone can share issues, contacts, announcements, links, and calendars. Team members can easily create workspaces for meeting discussions, documents, tasks, and other items that increase their productivity.

Accessing the SharePoint Site

Connecting from your government PC, via:
http://share.nida.nih.gov
Connecting from a remote or non-trusted PC:
Login to VPN, enter the url: http://share.nida.nih.gov
Users will be prompted for login credentials when accessing remotely. Username must be input as: nih\<username>

HELP

For questions or problems, please contact:
For help request:
http://share.nida.nih.gov/SelfHelp/Pages/request.aspx
Or send an email to: NIDASharePointHelp@lcgsystems.com

Navigating the SharePoint Window

1 **Breadcrumb Navigation**
This tool displays the navigation path of the current page. Each "breadcrumb" is a link to a site or page that sits above the current page in the site hierarchy.

2 **Link Bar: Home Tab**
This includes the tabs that appear along the top of the site. The Home tab always brings you back to the Home page.

3 **Quick Launch**
The Quick Launch bar appears along the left side of the page. It is divided in sections.

4 **Recycle Bin**
If you delete an item, list, or file by mistake, you may be able to retrieve it from the Recycle Bin. Remember that objects are permanently removed from the Recycle Bin after 30 days.

5 **User Settings**
This feature allows users to view personal options, manage their account, edit profiles, delete alerts, and sign out.

6 **Search**
This feature searches for keywords and text in the current resource's subcategories and files; it does not search outside the site.

7 **Help**
Users can use the Help feature to get answers to questions or How To's.

8 **Web Parts**
This site is composed of Web Parts (Announcements, Calendars, Links, etc.) to view and work with items. These are created and customized by the System Administrator.

Working with Libraries and Documents

Libraries are an easy way for a team or department to update and manage files in a central location.

Any type of file can be saved in a library, including documents, spreadsheets, presentations, pictures and forms.

Creating a New Document in a Library

To create a new document in a library, perform the following steps:

1. Open the library in which you want to create a new document. (Most libraries will be included in the **Quick Launch**).
2. Click the **New** button on the taskbar and select **New Document** from the list.
3. Work with content of the file as you would normally. When you are finished working with the file, save and close it. A **Save As** dialog box appears.
4. Notice that the Save location is on the SharePoint server, not your computer. Enter the file name in the **File name** field.
5. Click **Save** and close the file. The document or file closes.
   To open it again, open it from the document library.

Creating a New Folder in a Library

To create a new folder in a library, perform the following steps:

1. Open the library in which you want to create a new folder.
2. Click **New Folder.** Enter a folder name and click **OK**.

Uploading a Single Document

You can upload documents to a library and make them available for other members of your team or department. **To upload a single document, perform the following steps:**

1. Open the library in which you want to upload a document.
2. Click the **Upload** button on the toolbar and select **Upload Document.** The **Upload Document** screen appears.

3. Click the **Browse** button and select the document you want to upload from your computer.
4. Click **Open.** The file path for the document appears.
5. (Optional) Click the **Add** as a new version to existing files check box and add a description in the **Version Comments** field. (This step only appears if versioning has been enabled in the library.
6. Click **OK**. The document is uploaded.

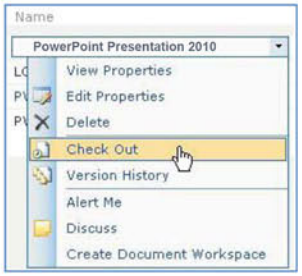
Uploading Multiple Documents

To upload multiple documents, perform the following steps:

1. Open the name of the library in which you want to upload the files.
2. Click the **Upload** button list arrow on the toolbar and select **Upload Multiple Documents**. The screen appears in two panes.
3. In the left pane, select the location or folder containing the documents you want to upload.
4. In the right pane, click the check box next to each file you want to upload and click OK. A dialog box appears to confirm the upload.
5. Click OK. The documents are uploaded.

Checking Out/In Files

If your security profile allows, you may check out a file to ensure that no other users can modify the file while you are working on it. The file stays on the server while you have it checked out.

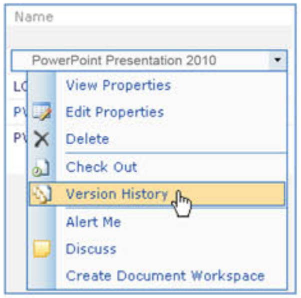


To check out a file:
Point to the desired documentand select **Check-Out** from the dropdown list. Click **OK**.

To check in a file:
Point to the desired document and select **Check-in** from the dropdown list. Click **OK**.

Viewing File Version History

A file's version history displays the changes that were made to a file over time, who made the changes, and when they were made. Depending on how the file was saved, you may be able to see previous versions of the file.



1. Point to the document and click the dropdown arrow to the right.
2. Select **Version History** from the list. The versions that are saved and their comments appear in the **Version History** screen.

Working with List Items

Lists are a main resource for information and collaboration in a SharePoint site. They are used to organize, store, and work with items. Item is the general term for objects that are created and saved in a list. Items can be: Announcements, Calendar Events, Tasks, Discussion Topics, Links, etc.

Creating a new item

1. Open the list in which you want to to add an item.
2. Click the **New** button and select **New Item** from the list. A screen appears where you can enter information about the item.
3. Enter the name of the item in the **Title** field.
4. Fill in the remaining information for the item and click **OK**. The item displays in the list.

Editing an item

1. Open the list that contains the item you want to edit. Point to the item and select **Edit Item** from the drop down list.
2. Edit the item and click **OK**.

Deleting an item

1. Open the list that contains the item you want to delete and point to the item.
2. Select **Delete Item** from the dropdown list and click **OK**.

Restoring an item

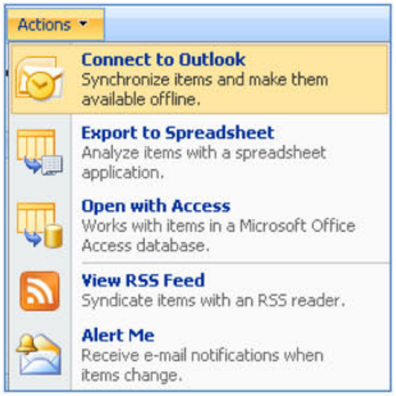
1. Click Recycle Bin on the Quick Launch bar and click the check box next to the item you want to restore.
2. Click **Restore Selection** on the toolbar.

Using SharePoint with Outlook

Users can connect lists or document libraries to Outlook. Calendars, tasks, and contact lists are the most common objects to synchronize.

To synchronize the SharePoint Calendar with your Outlook Calendar, perform the following steps:

1. Click the **Calendar** you want to synchronize.
2. Click **Actions, Connect to Outlook**.
3. Click **Yes** to the confirmation dialog box.
4. View, Open, Drag-and-Drop events as needed.



Users can also access documents in a SharePoint library through Outlook; to do this, perform the following steps:

1. Open the library you want to synchronize with Outlook.
2. Click **Actions, Connect to Outlook**.
3. Click **Yes** to the confirmation dialog box.
4. Expand the SharePoint library to see its folders.
5. View, Open, Drag-and-Drop files as needed.

Synchronizing Events to Outlook Calendar

First, Add an event.

1. From the homepage, click **Calendar**.
2. The List toolbar, click **New**.
3. Add the appropriate information in the fields listed.
4. Click **OK**.

Now, synchronize the event in SharePoint to Outlook.

5. Return to your SharePoint site and go to your Calendar list.
6. From the Calendar list toolbar, click **Actions/Connect to Outlook**.
7. Go back to Outlook and click **Yes** to add the SharePoint calendar Outlook.
8. Make sure you are in Outlook.
9. In the Outlook Bar on the left, click the checkbox next to the normal Outlook Calendar to deselect it. This will leave the newly added SharePoint calendar selected. Make sure the SharePoint calendar is the only calendar open in Outlook.
10. Select **File/New/Appointment**.
11. Add a new appointment, then save it by clicking **Save and Close**.
12. In Internet Explorer, return to the calendar list and refresh page.