



SHAREPOINT TRAINING NOTES

(For Assistance with these Instructions Email: pprice@net56.com)

WEBSITE ACCESS

URL Address: <http://www.rlas-116.org/panthers/websites>

Log on using your windows logon credentials (note: when periodically prompted to create a new password, the new password you create follows to your school website login as well).

EDITING INSTRUCTIONS

Website Editing

1. Basic editing of web parts updating existing web pages;
2. Adding pictures/logos/graphic images and/or documents to be linked to new pages you will create or pages you are editing;
3. Creating new pages.

Guidelines for **Editing Web Parts in Existing Pages** (item 1):

Login to website.

Once logged in, you should see the Page Editing Toolbar across the top of the page with the tools: Page, Workflow, Tools, Edit Page, Submit for Approval, Publish. Note: If you do not see this Toolbar across the top of the page, go to SITE ACTIONS and select SHOW PAGE EDITING TOOL BAR.

Click the "Page" arrow (on the Toolbar) to see the drop-down menu, select "Check Out" to Check Out the Page you plan to Edit, then click "Edit Page" on the Toolbar. (Note: you can also select "Edit Page" located under Site Actions.) You should now see the web parts on the page.

Note: An information icon  under the Toolbar should display the following message:

“Remember to check in so other people can see your changes. (Do not show this message again) “

Or you may also see a message in this same area: "The page is currently checked out by...." if the page you plan to edit is checked out by someone else with permissions to do so.

Editing Content Web Parts (Page Content)

- Editing Page Content Web Part (top web part)
 - Click on Edit Content (under Page Content Tab)

The web part window has a toolbar that looks similar to toolbars in word processing programs and they function similarly. Using the mouse pointer to point over each tool will “pop-up” the tool description; for inserting hyperlinks and images, after clicking on the appropriate tool a window will open enabling browsing to uploaded documents, images, or web pages.



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- Editing Announcements Web Part
 - Click on Add an announcement and enter info into the Announcement window; Required information is "Title" of the announcement indicated by a red asterisk.
 - Set announcement expiry date in the Expires field at the bottom.
 - Input descriptive info as desired in the Body field.
- Editing Calendar Web Part
 - Click on Add new event and enter info into the Calendar window; Required information fields are "Title", "Start Time" and "End Time" of the event indicated by a red asterisk.
 - Input descriptive info as desired in the Description field.
- Editing Links Web Part
 - Click on Add new link and type info into the Links window; Required information is "URL" link indicated by a red asterisk.
 - Input descriptive info as desired in the Description field.
 - Input additional descriptive info as desired in the Notes field.
- Editing Content Editor Web Part
 - Click on Edit Page to view Web Parts
 - Begin web part editing by clicking **edit** → select **Modify Shared Web Part** in the web part drop-down menu and click on the **Rich Text Editor** button (Right side of window) to open the web part. The web part window has a toolbar that looks similar to toolbars in word processing programs and they function similarly. Using the mouse pointer to point over each tool will "pop-up" the tool description; for inserting hyperlinks and images, after clicking on the appropriate tool a window will open enabling browsing to an uploaded document, image, or web page.

Content Editor Web Parts are used for inputting / formatting text, creating tables, adding in images and Hyperlinking documents.

Click "OK" on the **Rich Text Editor** window (bottom) when finished with editing the web part.

Formatting Web Parts

Click to Edit Page, click on **edit** (or drop-down arrow) on the web part to select Modify Shared Web Part. Toward the bottom of the Content Editor Dialog Box that opens up with the Rich Text Editor toward the top, you will see:

- Appearance
- Layout
- Advanced

Click (once) on Appearance and you will see the "Title" area open up. This Title may say Content Web Part, or it may have a new title; if you prefer, you can highlight this text and use the Backspace key to remove what is in this Title box, and type in a new Title or leave blank for no Title on the web part. In Editing mode, you may see it display Untitled in the Title area, but it should not display when the pages go live on the site.



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Formatting Web Parts (cont'd)

Web part borders or no border, etc., can be set at the bottom of this same dialog box in the "Chrome Type" menu at the bottom. New web parts default to a Title and Border; click on the drop-down menu to see the options to change to None, Title and Border, Title Only, Border Only. Click Apply.

Click "OK" on the **Rich Text Editor** window (bottom) when finished with editing the web part.

Once Page Editing is completed click "Save and Stop Editing" under "Page" on the Toolbar. If you are done with the page editing and ready to submit for approval, click on the Toolbar "Check In to Share Draft" and then click on "Submit for Approval". A workflow window will open, scroll down on the page to the lower right and click "Start" to initiate the Approval process.

Note: You should receive an email message automatically that indicates you have started a parallel approval process with an embedded link for checking approval process status.

Please follow these guidelines for item 2 (adding pictures/docs/etc.) before you begin editing web pages, begin with uploading items to be added and/or linked to pages:

After logging in to your website, go to SITE ACTIONS and select VIEW ALL SITE CONTENT (Right-corner of the window).

The "All Site Content" window opens and displays site folders;

- click on the appropriate folder (documents or images) to Upload to the website

The open folder displays a toolbar: New, Upload, Actions, Settings;

- click on the arrow to the right of "Upload " and select "Upload Document" or "Upload Multiple Documents" if you have more than one to Upload

Two results may occur when you upload documents/images into the SharePoint site.

1. You will either immediately get the dialog window that prompts you to Check-In the document (and/or) image and once you do, you should be redirected to the Site Content page where you would see the file you just uploaded listed by name and ' **!NEW** ' next to the filename. When you click next to the filename you should see the drop-down arrow that opens up a menu; select "Publish a Major Version". Click "OK" in the window that opens up and another window opens [Start Parallel Approval], click "Start" in the lower right corner. Once completed the [Site Content] page should open and you should see your file with "Pending" status which means it is pending approval.
2. On occasion after uploading a file while Editing a Page, the system returns to Page Editing without going through the Check-In, etc., process. If this happens go to **Site Actions** and click on **View All Site Content** to get to the content window; click to open the "Documents" or "Images" folder to see the file you just uploaded.

If the documents/images are in "Draft" status, click (right of the file) the drop-down menu and go through the process of selecting "Check-In" and "Publish Major Version" in the window that opens to initiate the Approval process.



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Approval Process

If you are submitting an edited Web Page for Approval and you receive an Error message, go back to the site and click on SITE ACTIONS, select VIEW ALL SITE CONTENT, click to open the Pages folder and find the page you are submitting for Approval. Click to the right of it to open the drop-down menu and select "**Check-In**"; the Approval window should open up. Click "Start" at the bottom right, in the next window that opens up, click "Major version (publish)"; click "Start" at the bottom right once more. This should complete the process. You should see "Pending" Status for the web page when the system returns to the Site Content Page and you should receive the Email alert.

Guidelines for **Creating New Pages** (item 3):

Login to your website

Click on SITE ACTIONS and select CREATE PAGE; in the window that pops up input a Page Title and <TAB> once - you will see the page address automatically assigned in URL Name, then click to select **Blank Web Part Page** in the menu box below and click "Create" at the bottom.

The next window that pops up should be to "Check In" the new page; if the [new] web page opens up instead, go to SITE ACTIONS, CLICK VIEW ALL SITE CONTENT, click on the "Pages" folder, locate the new page and click on the arrow next to its name to see the drop-down menu, select **Check-In** and select "... Major version (publish)"; click "OK" at the bottom. The [Start Parallel Approval] window opens, click "Start" at the bottom right on the page.

You will be able to Navigate the Pages by selecting SITE SETTINGS under SITE ACTIONS and click **Modify Navigation**.

(Navigate) Reordering Web Pages on the Navigation Bar

Go to Site Actions and click to select **Site Settings**- under Site Settings click **Modify Navigations**. Scroll to the right and down in the window that comes up to see the site's web pages. The pages are listed under a Toolbar that displays Up and Down arrows; click once to select the page you want to move up or down within the left bar navigation and click the appropriate button on the tool bar to move it.

Navigation Links

Create Navigation Links with the following directions:

- Click on **Site Actions** and select **Site Settings**, select **Modify Navigation**. (The Site Navigation Settings window will open).
- Scroll to the right and select "Add Link" in the Toolbar located above the list of site pages. The dialog window that opens prompts you for a Title of the link and the URL link address. Browse through the window to the location of the URL address you would like to link, or simply copy the URL from its location and paste it into this area, and click "OK".

Note: the complete URL will need to be inputted. The link should appear at the bottom of the site pages listed in the Site Navigation Settings window and also at the bottom of the left navigation bar in the website.

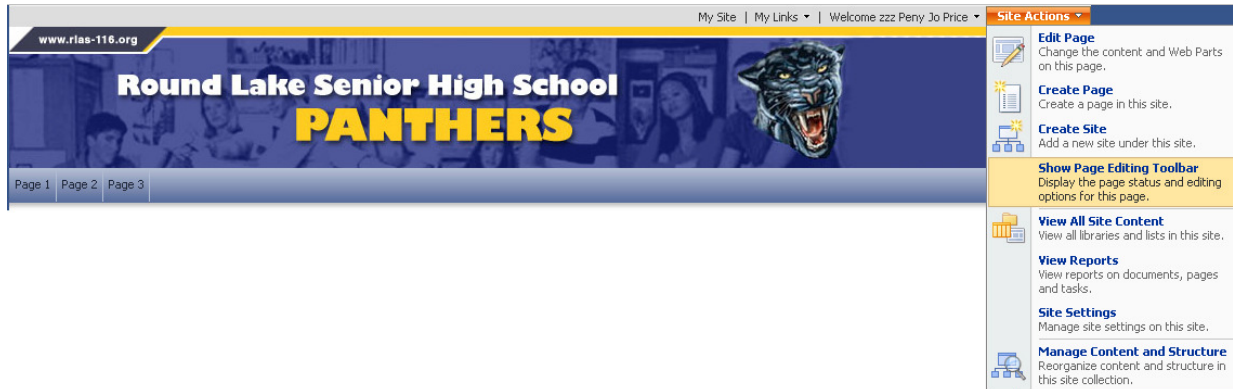


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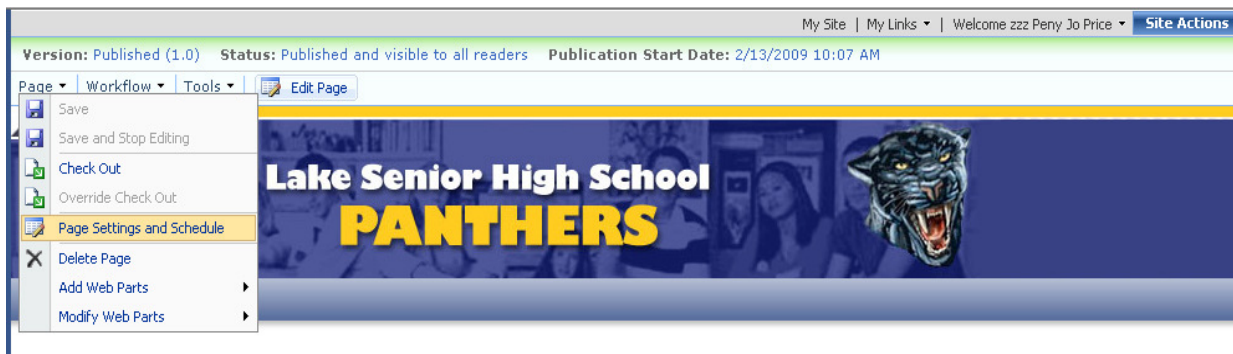
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Changing Page Names on Existing Pages

Click on the Page to rename and change the Page name through the Page Editing Toolbar. This toolbar should be visible at the top of your web page. If you do not see this toolbar, click on **Site Actions** and select **Show Page Editing Toolbar** from the drop down menu.



Next, click on **Page** menu and select Page Settings and Schedule.



The **Page Settings** window opens. Leave the **URL Name** box (first box) as is—do not change. Click in the **Title** box only to change the Page name (second box). Click **OK** at the bottom of the window. The new Page name should display once you **Check In** the Page.