

Dear valued customer:

On behalf of Microsoft and Apptix, welcome to Windows® SharePoint® Services! SharePoint is a tool designed to enable you to create your own workspace or portal quickly and easily, and mold it to fit the shape of your business needs.

As a new user, you may be wondering how and where begin using your SharePoint Service? This series of short guides should help you to get started by providing a basic overview of a feature, while also showing you how and where you can access them in SharePoint.

Included in each guide is a mini “How To” area that will help you to access each feature. You will notice the **Easy 1,2,3** icon (shown below). When you see this icon, it means that the section of that document contains quick and easy-to-use directions on how to use or add something to your site.



Should you have any questions regarding a feature and/or how you can access it, use the Help link from the top navigation of the SharePoint interface can often provide quick and easy answers. Should you need additional support for a more complex question or have any questions regarding your account, please feel free to contact [Apptix SharePoint Customer Service and Support](#).

One last note, these guides will focus on the Team Site template, which is the default site template that you will encounter when you first access SharePoint. A team site is designed to enable teams to create, manage, and share information quickly and easily. It includes a document library and basic lists such as Announcements, Events, Contacts, and Links. As new templates are added and used, the features and the methods for accessing them may change.

Should you have any questions regarding your SharePoint Service or require any assistance in using these guides, the following contacts should be helpful:

Sales Support

Phone: (703) 890-2860

Email: SharePointSales@apptix.com

Technical Support

SPSupport@apptix.com

Once again, welcome to the world of SharePoint! We thank you for choosing Apptix and look forward to helping you to make your implementation of SharePoint a success!

Regards,

Your Apptix SharePoint Sales and Support Teams!

A Basic Introduction to SharePoint Services Information Management Features

The purpose of this document is to provide Apptix customers with a basic overview of the Information features of Windows® SharePoint® Services. This document is provided for informational purposes only and offers no warranty or guarantee of service. Should you have any questions regarding the content of this document, your service and or your SharePoint Account, please contact [Apptix SharePoint Support](#).

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INTRODUCTION

One of the most challenging and frequent tasks that organizations are facing is how to manage their information. Whether it is a matter of version control, accessibility or security, information management is a critical issue that can have a major impact on productivity and employee satisfaction.

SharePoint sites are designed to help make information management easier and more effective. While each template can be customized to accommodate different types and sources of data, the default Team Template is set to allow storage of common types of information, such as event calendars, contacts, Web links, discussions, issues lists, and announcements. But even within this template, you can create custom lists for your site that meet your organization's specific information-sharing and management needs.

In SharePoint, lists are typically used to manage this type of information. Here we will examine the five basic list types: Announcements, Contacts, Events, Links and Tasks.

ANNOUNCEMENT LISTS

Announcements are any messages that you wish to communicate with your users. These can be as brief as reporting a system outage or as detailed as describing a new set of guidelines for a project. An Announcements List provides a central place for users to go to check for new team messages or to post one of their own, depending upon how the list access is set up. For team leaders, this offers a single source for team communications that is visible and accessible to all users.

How To Create, Edit and Delete Announcements



Your default site comes with a built-in Announcements list.

To access and edit this:

- Click **Announcements** from the body of the screen to view the list.

To add a new announcement to the Announcements list:

- Click **New Item** on the lists toolbar.
- Type in the title and text of your announcement. You can schedule an expiration for your announcement by adding a date to Expiration box or by clicking on the calendar icon and selecting the date there.
- Click **Save and Close** and you will see the title of your announcement, designated as "NEW", as well as the date and time when it was posted.

To edit or delete your announcement:

- Click on the title link.
- On the next screen, select either **Edit** or **Delete** from the menu bar.

Note You can also find all lists in your site by clicking **Documents and Lists** on the top link bar or by selecting **Lists** from the side navigation on the home page of your SharePoint site.

CONTACT LISTS

Contacts can include anyone whom your team needs to communicate with. Using the contact list, you can provide a single, centralized repository from which users can access contact information, quickly and easily. **For Example:** A list of all project team contacts or vendors involved in a project. Contact information (such as telephone number, e-mail address, and street address) can be entered manually or copied directly to or from an email address book. (This requires a compatible address book program such as Microsoft Office Outlook® 2003 and/or Microsoft Internet Explorer 4.0 or later).

How To Create, Edit and/or Delete Contacts



Once again, since your default SharePoint site already contains a built-in Contacts list, we will work from there. To view your Contact List:

- Click on the **Contacts** link from the side navigation.

To add a new contact to the Contacts list:

- Click **New Item** from the menu bar.

To add contacts from an Outlook address book:

- Select **Import Contacts** from the menu bar. This will prompt a pop-up window from your Outlook address book.
- Select the contacts that you wish to add from your address book to the Contact list and click **OK**. (Some users may see a pop-up warning that another program is trying to access Outlook. For those users, allow the access by clicking **OK**.)

To edit or delete a contact:

- Select the contact by clicking on the contact's name.
- To edit, click Edit from the menu bar, and type in the fields as needed, then select **Save and Close** from the menu bar.
- To delete, select **Delete** from the menu bar.

EVENT LISTS

Events such as web seminars, conference calls and meetings play an important role in getting things done. Having your schedule for team events centrally accessible, makes it easy for team members to plan their time accordingly and avoid conflicts. Events from your Events list can also be linked to your Outlook Calendar.

How To Create, Edit and/or Delete Events



Once again, since your default SharePoint site already contains a built-in Events list, we will work from there. To view your Events List:

- Click on the **Events** link from the side navigation.

To add a new Event to the list;

- Click **New Item** from the menu bar.
- Enter the title, beginning and ending dates, the description, location, recurrence and check whether or not you wish to use a Meeting Workspace to organize attendees, agendas, documents, minutes, and other details for this event. Should you select to create a meeting workspace, a New Meeting Workspace Screen will follow. (We will cover this later on in another document) For now, do not select to create a Meeting Workspace.

To link to Outlook:

- Open your site to Events Page.
- Click **Link to Outlook**

To edit or delete an event:

- Select the event by clicking on the event name.
- To edit, click Edit from the menu bar, and type in the fields as needed, then select **Save and Close** from the menu bar.
- To delete, simply select **Delete** from the menu bar.

LINK LISTS

The purpose of Links Lists is to allow quick access via links, to websites that are of interest and importance to your team. A marketing team, for instance, might use this feature to provide quick access to websites on which they are currently running advertising campaigns, or in which, they may have received media coverage. This list is not included as part of your default page, so here we will show you how to create this.

How To Create, Edit and/or Delete Links



To create a Links list (or any other list):

- Click on the **Lists** link on the side navigation.
- On the next screen you will see a menu listing the five types of lists that defined in this default template: Announcements, Contacts, Events, Links and Tasks. From here you can select any of these types or create a custom list. (We will cover the creation of custom lists in a later document.) For now, select **Links**. This will bring up the Links control screen.

To add a link:

- Click **New Item** on the from the top menu bar.
- Type in the URL, description and any notes regarding this link, then click **Save and Close**. On the next screen you will see your new link and the newly created Links List.

To edit or delete a link:

- Click on the link title.
- On the next screen, select either **Edit** or **Delete** from the menu bar.

TASK LISTS

Getting the job done right, takes careful planning, coordination and execution. Given the fast pace and tight deadlines for most projects, managing who is responsible for what and what the status for each task is can be a real challenge. That is why many users integrate the task list into their team site. Using the task list, managers can easily track the progress of each task, while other team members can track the progress of tasks that need to be coordinated with their own tasks. These can also be set to coordinate with the tasks features in Outlook (We will cover this topic in a later document.)

How To Create, Edit and/or Delete Tasks



To add a task:

- Click **New Item** on the from the top menu bar.
- Type in the task name, description, to whom it is assigned and any other relevant data, then click **Save and Close**. On the next screen you will see your new task and the newly created Tasks List.

To edit or delete a task:

- Click on the task title.
- On the next screen, select either **Edit** or **Delete** from the menu bar.

USING YOUR EXISTING LISTS AND SPREADSHEETS

To avoid re-typing information and save time, you can also use any lists or spreadsheets that you have previously created as a list on your SharePoint site. SharePoint will allow you to import the data from the spreadsheet and will display it the same layout (columns and rows) as the original spreadsheet, in columns that team members can filter and sort, with commands that enable team members to add, edit, and delete items.

To import data from a spreadsheet, you must have a SharePoint-compatible spreadsheet program, such as Microsoft Office Excel 2003, and Internet Explorer 5 or later installed. If you have a SharePoint-compatible productivity program installed, such as Microsoft Office Professional Edition 2003, you can view and use your lists in your team site by using datasheet view. The datasheet view allows you to quickly add, delete, and update list entries, just as you would in a spreadsheet program, without having to switch to a separate program.

This allows you and your users to quickly and easily upload and utilize your existing documents and spreadsheets to populate your SharePoint site. This feature often reduces individual data islands and the amount of materials being saved over and over again by individuals and groups.

How To Upload An Existing List or Spreadsheet



To upload an existing list or spreadsheet:

- Click **Create**, from the top nav.
- On the Create Page page, click **Import Spreadsheet**.
- Select the spreadsheet that you wish to import and click on the **Import** button.
- A dialog box will pop-up asking how you want the fields in your spreadsheet to be represented in SharePoint. Follow and complete as directed. Once you are finished you will see your new list added to your site and accessible.

HINT: If you use the Datasheet View, you can view any list in spreadsheet format and more easily edit and manipulate the data in the list. To view a list in datasheet view, click **Edit in datasheet view** on the list page.

CUSTOM LISTS

While the list types that we have reviewed thus far can meet a number of your existing needs; many users find the need to create their own custom lists. SharePoint supports this and allows user to build these customized lists quickly and easily

Creating Custom Lists



Creating a custom list can be done in two stages:

- First, from the top navigation bar, click **Create**, and specify **Custom List**.
- This will bring up the **New List** screen. On this screen enter the name and description for your custom list and click **Create**.
- This will create your custom list. Next you will add columns. From the side navigation, click **Modify settings and columns**.
- For each column that you want to add, in the **Columns** section of the **Customize** page, click **Add a new column**. Select the attributes for the new column, then click **OK**. Your new column should be added.

To add data to this list:

- Click **New Item** from the menu bar.
- Add your information and click **Save and Close**. Repeat these steps to add as many new lists, columns and items as needed.

We hope that this document has been helpful to you as you. The next document in this series will cover the basics of File Sharing and Document Management.

Should you have any questions regarding the material covered within this document or need any assistance with your SharePoint site, please contact Apptix SharePoint Support at SPSupport@Apptix.com.

Getting Started With SharePoint Frequently Asked Questions (FAQs)



When you see **Easy 123**, it means quick and easy-to-follow steps for building and improving your site. Look for this logo for helpful "how-to's"!

1. *How do I access my SharePoint site?*

To access your SharePoint site, open your browser and type in the web address (URL) that you selected for your site. A pop-up window will prompt you for your login and password. Simply type them in, click **OK** and you will see the Dashboard screen for your SharePoint site.

If you have upgraded your account from a Trial Account, your access will be the same as it was during the trial. As long as you upgraded before the end of your trial, your site and all content that you had created and uploaded will still be accessible.

2. *Where should I begin when developing my SharePoint site?*

Start by logging into your [Account Management Center](#) on the SharePointSite.com website at www.SharePointSite.com/manage. Login using your SharePoint login and password and click on the **Get Started Kit** links on the side navigation.

There you will find Apptix's SharePoint Get Started Kit, which includes a Get Started Checklist, FAQs, a Feature Overview and Quick Reference Guide, and more. This will provide you with all of the knowledge and information you need to confidently work within SharePoint. Most users will use this to work with the default Team Template to develop their initial main site.

3. *Is there a limit to the number of sub sites or workspaces that I can add?*

NO! Regardless of which account plan you have selected, there is **no limit to the number of sub sites or workspaces that you can build**. You are only limited by the number of users and the amount of storage space available as part of your plan.

You can opt to add additional users and storage at any time, as needed, by upgrading to the next highest account plan, or at a rate of: \$5.00 per month per block of 5 users; and/or \$5.95 per 100 MB or \$49.95 per 1 GB block of storage space.

4. *How can I add a new sub site or workspace?*



1. Within your SharePoint site, click on **Create** from the top navigation.
2. In the *Web Pages* section, click on the **Sites and Workspaces link**.
3. Enter the basic information for your new sub site/workspace: title; description; and address. Set the permission level and select the language. Click **Create**.
4. You will then be prompted to select a template for your sub site. Select a template and click **OK**. Your new sub site will appear, ready to be customized.

5. How can I add users?



1. Within your SharePoint site, select **Site Settings** from the top menu.
2. From the *Site Settings* page, click **Go to Site Administration**, from the Administration section.
3. On the *Top Level Site Administration* page, click **Manage Users** from the *Users and Permissions* section. The *Manage Users* page will display a list of all users on your account. From this screen you can add and delete users, and set or change user permissions.

Note: This can be done on a site by site basis or for all sites/workspaces.

6. How can I delete users?



1. Within your SharePoint site, select **Site Settings** from the top menu.
2. From the *Site Settings* page, click **Go to Site Administration**.
3. On the *Top Level Site Administration* page, click **View Site Collection User Information** from the *Site Collection Administration* section. The *Manage Site Collection Users* page will display a list of all users on your account. Check the box next to the user name(s) which you wish to delete and click **Remove Selected Users** from the menu bar.

Note: This can be done on a site by site basis or for all sites/workspaces.

7. How monitor usage of my storage space?



1. Within your SharePoint site, select **Site Settings** from the top menu.
2. From the *Site Settings* page, click **Go to Site Administration**, from the Administration section.
3. On the *Top Level Site Administration* page, click **View Storage Space Allocation** from the *Site Collection Administration* section. The *Storage Space Allocation* page shows a chart at the top of the screen indicating the amount of storage space used and space remaining. In addition, this page also displays a list of sub sites with the number of items associated with each site and how much storage space each is using.

8. Who do I contact, when I have questions or need support?

SharePoint Sales

(703) 890-2860

SharePointSales@apptix.com.

SharePoint Technical Support

[Email Support Form](#)

Upon registration, you will be assigned a sales representative help you to get started and get the most out of SharePoint. You will receive an email from your assigned sales representative within a couple days of your registration. Thereafter, should you need assistance; you can always contact a member of our technical support team.

Installing a SharePoint Site Template

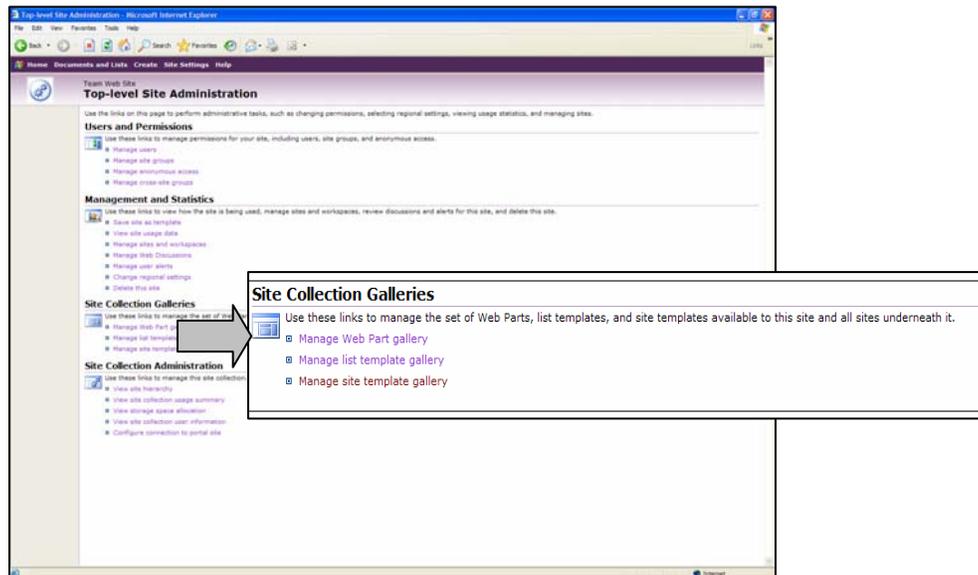
To help you to get your SharePoint site up and running as quickly and easily as possible, Microsoft and Apptix provides a number of pre-designed templates for you to choose from. **These templates are designed to enable you to launch a professional site, specific to your department, function or task in a matter of minutes!**

For a full list of templates by category, visit www.sharepointsite.com/hosted_sharepoint/templates/

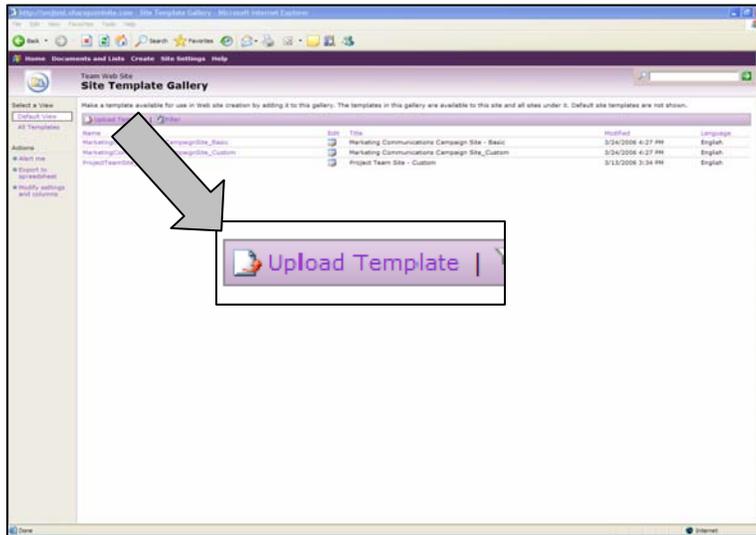
The following instructions will help you to download and implement a template in a matter of minutes. From there, you can customize the template by simply entering your own materials and data, or for additional customization, you can use Microsoft FrontPage.

Downloading and Adding a Template

1. Select the template that you want to implement and download the file from the Microsoft website by clicking the **Download** button and saving the file to your computer.
2. Double-click the program file on your hard disk to extract the template files to a location of your choice on your computer. (Note: two files will be extracted: **Name_Basic.stp** and **Name_Custom.stp**)
Tip: Name_Basic.stp will provide you with an Out-of-the-Box template. **Name_Custom.stp** offers a more advanced template version that requires you to make minor changes, such as replacing sample logo with your own.
3. Login to your SharePoint account and open the top-level site where you want to install the template. Click **Site Settings** from the top menu bar. In the *Administration* section of the *Site Settings* page, click **Go To Site Administration**. In the *Site Collection Galleries* section of the *Top Level Site Administration* page, click **Manage site template gallery**.



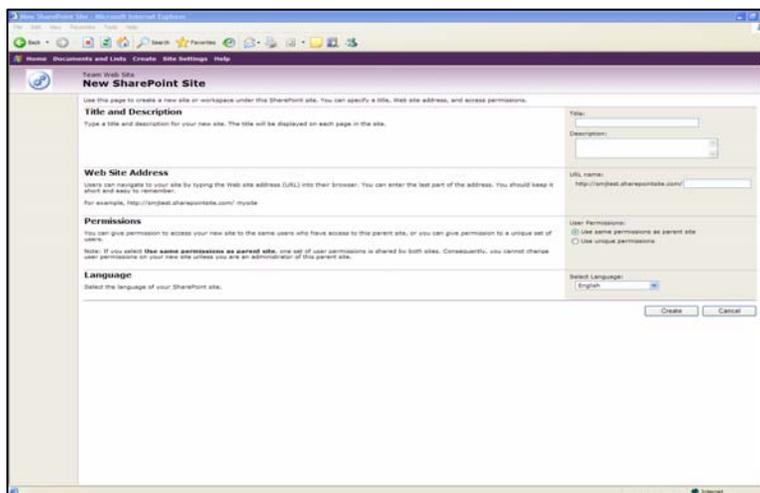
- On the *Site Template Gallery* page, click **Upload Template**. Browse to the location where you saved the extracted template to and select the template (Most customers prefer using "Custom" template file, but we urge you to try both, "Custom" and "Basic"). Click the **Open** button. Click **Save and Close** to upload the template.



This will add the template to the list of available options in SharePoint. Several templates are pre-loaded in your SharePoint Service. Instructions for implementing and customizing a template are included below. Check the SharePointSite.com website for new templates.

Implementing a Template For Your SharePoint Site Easy 1,2,3

- Open your Windows SharePoint Services account. On the top navigation bar, click **Create**.
- In the **Web Pages** section of the *Create* page, select **Sites and Workspaces**.
- Complete the information on the *New SharePoint Site* page, then click **Create**.

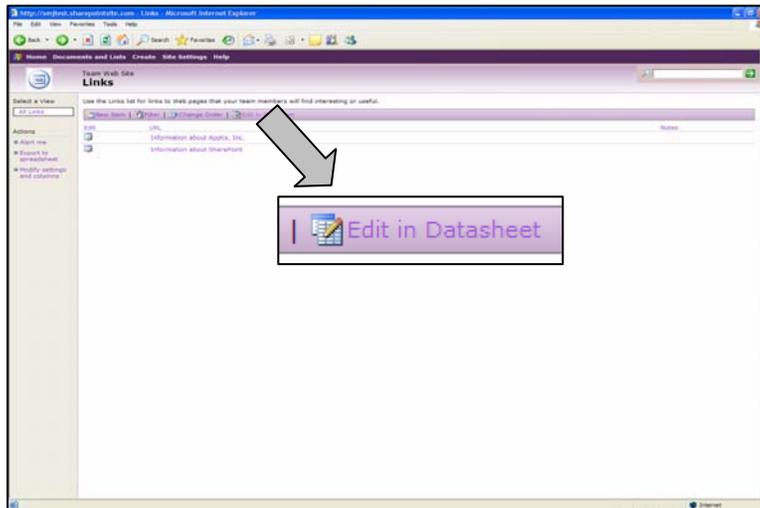


4. On the **Template Selection** screen, select the new template from the list, and then click **OK**.

Having completed these steps, you will now have a site modeled using the template that you have selected. As you will see, the template comes with placeholder data and suggested locations for documents, lists, events, etc. You can change and customize the organization of your site at any time and in any way. The instructions in the next section will help you to do that.

Customize The Template

1. To erase sample content from the site, go to **Documents and Lists**.
2. Select a category with one or more items. Click **Edit in Datasheet**.



3. Delete all line items (you can select all at once) from the Datasheet as you would in the Excel document. Repeat for all categories.
4. To replace images and customize colors, use Microsoft FrontPage.

All of the templates listed on our website are available for your use for free. We encourage you to customize and tailor these templates as your organization demands. Should you have any questions regarding templates or require any assistance, you can always contact [Apptix SharePoint Technical Support](#) or your sales representative.

SharePoint Quick Reference Guide

<p style="text-align: center;">Adding New Sites/ Workspaces</p> <ol style="list-style-type: none"> 1. Click Create from top nav. 2. Click Sites and Workspaces. 3. Enter the basic info. Set permission level and language. Click Create. 4. At prompt, select a template and click OK. 	<p style="text-align: center;">Adding Users</p> <ol style="list-style-type: none"> 1. Select Site Settings from top nav. 2. Click Go to Site Administration. 3. Click Manage Users. 4. Click Add Users. 5. Add email address, set user type and click Next. Type email invite message and click Finish. 	<p style="text-align: center;">Adding Alerts</p> <ol style="list-style-type: none"> 1. Go to the page with the item or document that you wish to create the alert for. 2. Click on Alert Me from the left nav. 3. Set the email address to which alerts should be sent, the types of alert to be sent and the frequency. 4. Click OK.
<p style="text-align: center;">Adding An Announcement/ Contact/ Discussion Board/ Event/ Link/ or Task</p> <ol style="list-style-type: none"> 1. Click Documents and Lists from top nav. 2. Click on item type, you wish to add. 3. Click New Item. 4. Type a title, add a description of the item and any date-related info (If needed). 5. Click Save and Close. 	<p style="text-align: center;">Adding New Pages</p> <ol style="list-style-type: none"> 1. Click Create from top nav. 2. Click on the page type that you wish to add. 3. Add the title, description and any other necessary data. 4. Click Create. 	<p style="text-align: center;">Adding Surveys</p> <ol style="list-style-type: none"> 1. Click Create. 2. Select Survey. 3. Enter the title, description, location and optional data. Click Next. 4. Enter Questions, type, answers, etc. When finished, click Finish.
<p style="text-align: center;">Changing The Language For a Site</p> <ol style="list-style-type: none"> 1. Select Site Settings from top nav. 2. Click Go to Site Administration. 3. Click Change Regional Settings 4. Select a language from the Locale Menu. 5. Click OK. 	<p style="text-align: center;">Changing User Passwords</p> <ol style="list-style-type: none"> 1. Select Site Settings from top nav. 2. Click View Information About Site Users. 3. Select the User. 4. Click Change Password. 5. Add the new password, confirm and click OK. 	<p style="text-align: center;">Checking Documents/ Images In and Out</p> <ol style="list-style-type: none"> 1. Open to the page or library containing the item that you want to check in/out. 2. Mouse over the item title. 3. Click on the arrow that appears to the right. 4. Click Check Out/In.

<p>Checking Storage Usage</p> <ol style="list-style-type: none"> 1. Select Site Settings from top nav. 2. Click Go to Site Administration. 3. Click View Storage Space Allocation. 	<p>Deleting Alerts For Other Users</p> <ol style="list-style-type: none"> 1. Click Site Settings from top nav. 2. Click Go To Site Administration. 3. Click Manage User Alerts. 4. Select the User who you wish to cancel alerts for. 5. Check the name of the alert(s) to be deleted. 6. Click Delete Selected Alerts. 	<p>Deleting An Announcement/ Contact/ Discussion Board/ Event/ Link/ or Task</p> <ol style="list-style-type: none"> 1. Click Documents and Lists from top nav. 2. Click on item type, you wish to delete. 3. Click on the item. 4. Click Delete Item.
<p>Deleting A Personal Alert</p> <ol style="list-style-type: none"> 1. Click Site Settings from top nav. 2. Click My Alerts On This Site. 3. Check the box next to the alert(s) that you want to delete. 4. Click Delete Selected Alerts. 	<p>Deleting Users</p> <ol style="list-style-type: none"> 1. Click Site Settings from top nav. 2. Click Go To Site Administration. 3. Click Manage Site Collection Users. 4. Check the box next to the User(s) to be deleted. 5. Click Remove Selected Users. 	<p>Editing User Information</p> <ol style="list-style-type: none"> 1. Click Site Settings from top nav. 2. Click View Information About Site Users. 3. Select the User. 4. Click Edit User Information. 5. Make any changes or additions. 6. Click Save and Close.
<p>Enabling Document/ Image Versioning In A Library</p> <ol style="list-style-type: none"> 1. Open your site to the page containing the document. 2. Click Modify Settings and Columns from let nav. 3. Click Change General Settings. 4. Click Yes in the <i>Document Versions</i> section. 5. Click OK 	<p>Opening A Site/ Workspace in FrontPage</p> <ol style="list-style-type: none"> 1. Open FrontPage. 2. Click File, Open Site. 3. Click My Network Places. 4. Type in the URL for your site or workspace. 5. Click Open. 	<p>Viewing Site/ Workspace Usage Reports</p> <ol style="list-style-type: none"> 1. Select Site Settings from top nav. 2. Click Go to Site Administration. 3. Click View Site Usage Data. 4. Select data type and format. 5. Click Go.