



**Council of Europe**

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**Information Technology Department**

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**SHAREPOINT COLLABORATIVE WORKSPACE**

**USER GUIDE**

## Contents

1.	Presentation of SharePoint.....	3
1.1.	Logging on.....	4
2.	Lists .....	6
2.1.	Displaying a list .....	7
2.2.	Navigating in a list .....	9
2.3.	Using the forum .....	10
2.3.1.	Create a new discussion.....	10
2.3.2.	Replying to, viewing, editing or deleting a post.....	11
2.4.	Using a document library.....	12
2.4.1.	Adding or deleting a document .....	12
2.5.	Using a calendar .....	16
2.6.	Connected functions.....	19
2.6.1.	Check-out.....	19
2.6.2.	Version History.....	21
2.6.3.	Approval.....	23
3.	Managing alerts .....	24
3.1.	Activating general alerts.....	24
3.2.	Setting up specific alerts .....	26
3.2.1.	Within a discussion board.....	26
3.2.2.	Within a document library .....	29
3.3.	Managing alerts.....	31
4.	Workspaces .....	32

## 1. Presentation of SharePoint

**SharePoint** is a collaboration tool which serves as an easy means of sharing documents and data between a large number of users.

SharePoint provides:

- a collaborative work service based on a website: SharePoint users can create specialised sites to share information, create and store documents, organise meetings and enable the members of a team to work together on the same project via a web browser.
- a document storage system: one of the basic principles of SharePoint is document storage, which simplifies the document sharing process. SharePoint stores documents in libraries. A library can be used to store one or more documents. Users can add more documents to libraries and other users with the appropriate rights can consult them via their web browser and also collaborate by modifying the documents.

## 1.1. Logging on

To access a [http://cws.m.coe.int/team21/DM\\_EXEC](http://cws.m.coe.int/team21/DM_EXEC) workspace you need to sign in with your user name (**e-mail address**).



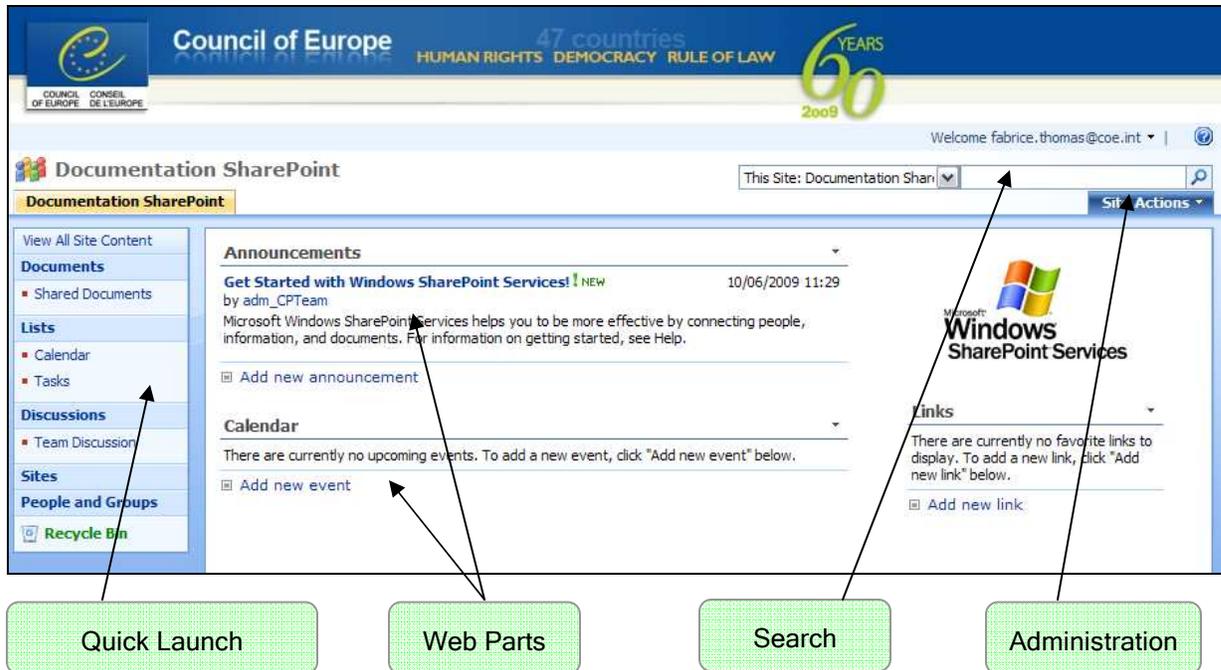
The screenshot shows a login form titled "Sign In / Connexion". It features two input fields: "Your email address / Votre adresse m  l :" and "Password / Mot de passe :". Below these fields is a checkbox labeled "Sign me in automatically / M'inscrire automatiquement" which is checked. To the right of the password field is a blue button labeled "Sign In / Connexion".

By ticking the "*sign me in automatically*" box you will install a cookie enabling you to log on during the 8 hours following your authentication without having to type in your identifiers again.

A <http://j.cws.m...> workspace is accessed automatically via the KEY account (integrated authentication).

Depending on the parametering of your browser you may be asked to identify yourself, in which case you must use your KEY\... account name and your usual password.

A welcome page will then be displayed along the lines of the one below.



The screenshot shows a SharePoint welcome page for 'Documentation SharePoint'. The page features a blue header with the Council of Europe logo, '47 countries', and '60 YEARS 2009'. Below the header, there is a navigation bar with 'This Site: Documentation Shan' and a search box. The main content area includes sections for 'Announcements', 'Calendar', and 'Links'. A left sidebar contains navigation options like 'View All Site Content', 'Documents', 'Lists', 'Discussions', 'Sites', and 'People and Groups'. Four green callout boxes with arrows point to specific elements: 'Quick Launch' points to the left sidebar, 'Web Parts' points to the 'Announcements' section, 'Search' points to the search box, and 'Administration' points to the 'Site Actions' dropdown menu.

Webparts are SharePoint elements (or blocks) that can be customised and are visible on your site's welcome page. Using webparts, you can directly display certain lists on your welcome page.

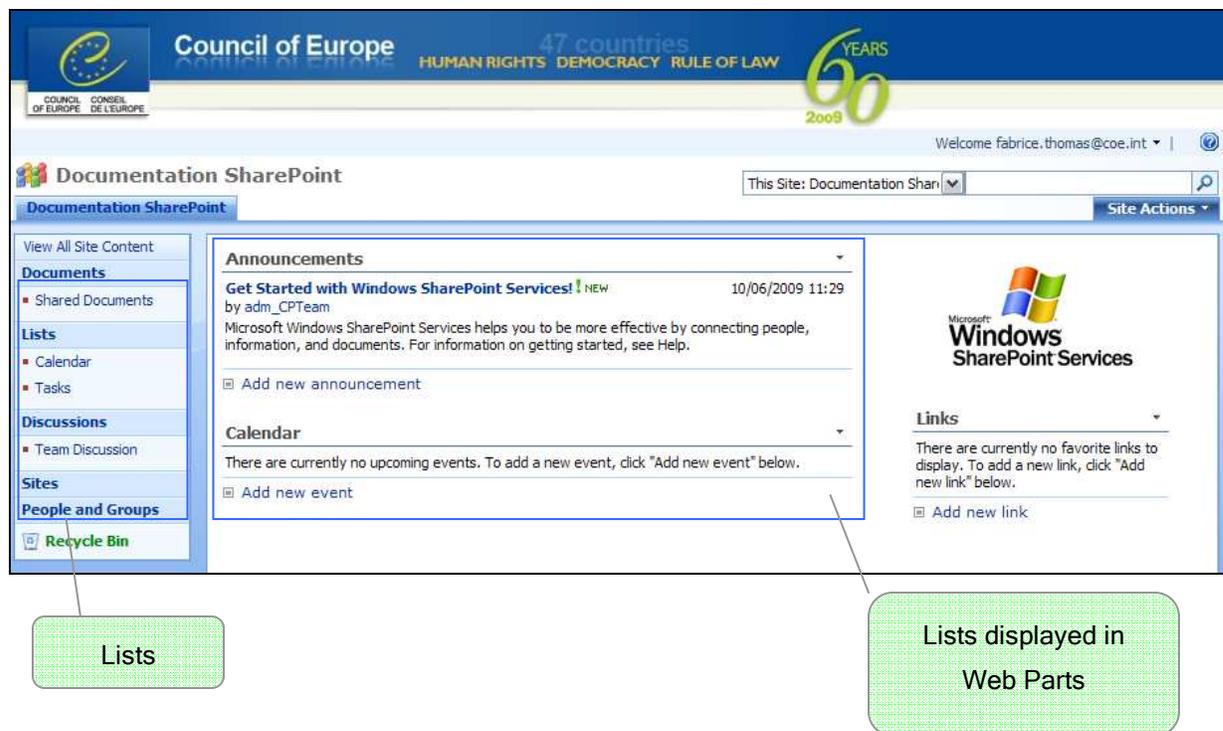
## 2. Lists

SharePoint stores all its information in the form of lists. They all work on the same principle but may take different forms.

A list is a set of elements, for storing various information. These are some of the most commonly used lists :

- ✚ lists of contacts (for storing names, addresses, telephone numbers etc)
- ✚ lists of tasks (type of task, description, percentage progress, deadline etc)
- ✚ lists of announcements (message with expiry date)
- ✚ lists of events (type of event, place, start date, end date etc)
- ✚ customisable lists, where the user (with adequate rights) creates a new list and determines which information is to be shown.

You can view all the lists to which you have access on the welcome page: in the quick launch bar and also in the Webparts section.



The screenshot shows a SharePoint site for the Council of Europe. The top navigation bar includes the Council of Europe logo, the text "Council of Europe", "47 countries", "HUMAN RIGHTS DEMOCRACY RULE OF LAW", and a "60 YEARS 2009" anniversary logo. The user is logged in as "Welcome fabrice.thomas@coe.int". The main content area is titled "Documentation SharePoint" and contains several web parts: "Announcements" (with a "Get Started with Windows SharePoint Services!" announcement), "Calendar" (with "There are currently no upcoming events..."), and "Links" (with "There are currently no favorite links to display..."). A left-hand navigation pane shows "Lists" under the "Documents" section. Two callout boxes are present: one labeled "Lists" pointing to the navigation pane, and another labeled "Lists displayed in Web Parts" pointing to the "Announcements" and "Calendar" web parts.

## 2.1. Displaying a list

There are two ways of displaying the contents of a list and the different items making it up:

- If the list is shown on the welcome page in the *web parts* section, you will see a specific view of the list. To see the list in its standard display, or change the view, click on the name of the list.
- If the list is shown in the quick launch bar on the left, simply click on the link.

Example: the screenshot below shows the two methods of accessing the **"Calendar"** list:



When you click on a list, a new page is displayed, showing all the list items.



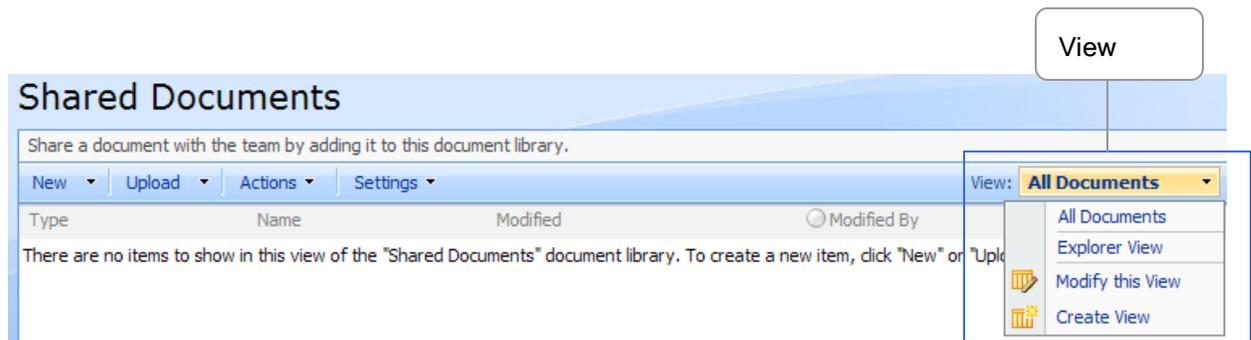
The screenshot shows a SharePoint site for the Council of Europe. The top navigation bar includes the Council of Europe logo, the text "Council of Europe" and "47 countries HUMAN RIGHTS DEMOCRACY RULE OF LAW", and a "60 YEARS 2009" anniversary logo. Below this is a "Documentation SharePoint" header with a search box and a "Site Actions" menu. The main content area is titled "Calendar" and contains a table of events. A left-hand navigation pane lists various site features like Documents, Lists, Discussions, and Sites.

	Title	Location	Start Time	End Time	All Day Event
	My Meeting Workspace <b>NEW</b>		10/06/2009 09:00	10/06/2009 16:00	
	My Meeting Workspace <b>NEW</b>		10/06/2009 16:00	10/06/2009 16:00	
	My Second Meeting <b>NEW</b>		10/06/2009 16:00	10/06/2009 16:00	
	My third Meeting <b>NEW</b>		10/06/2009 16:00	10/06/2009 16:00	

Here you can see that all the columns are shown.

## 2.2. Navigating in a list

Views is a key operating principle of SharePoint. Views can help you classify and manage information and documents far more effectively, while keeping things flexible. The same document, or the same information, may be displayed in several different ways without any redundancy.

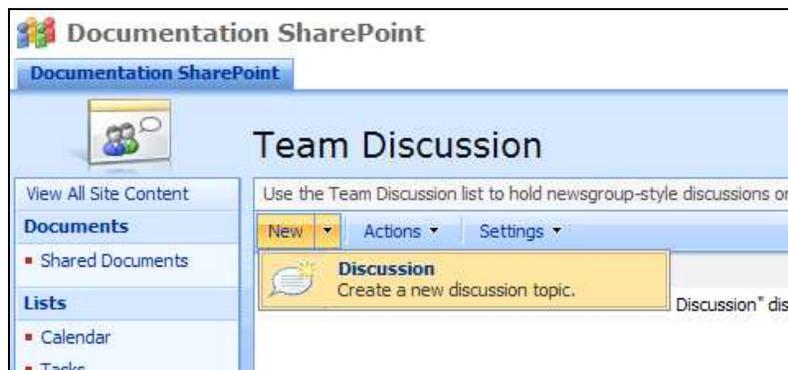


The different displays are available for each list. When you click on a list, the **"All Documents"** display is activated by default, and all the list items are displayed, in no particular order.

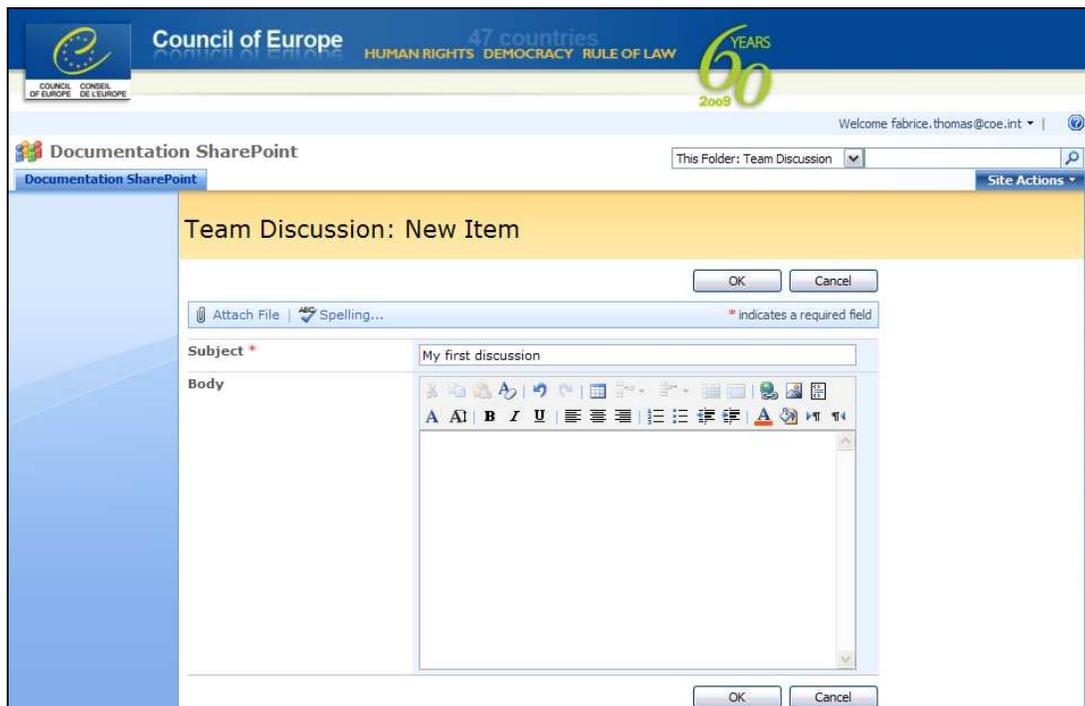
## 2.3. Using the forum

### 2.3.1. Create a new discussion

To create a new discussion, click on **"New → Discussion"** in the main page of the team discussion.

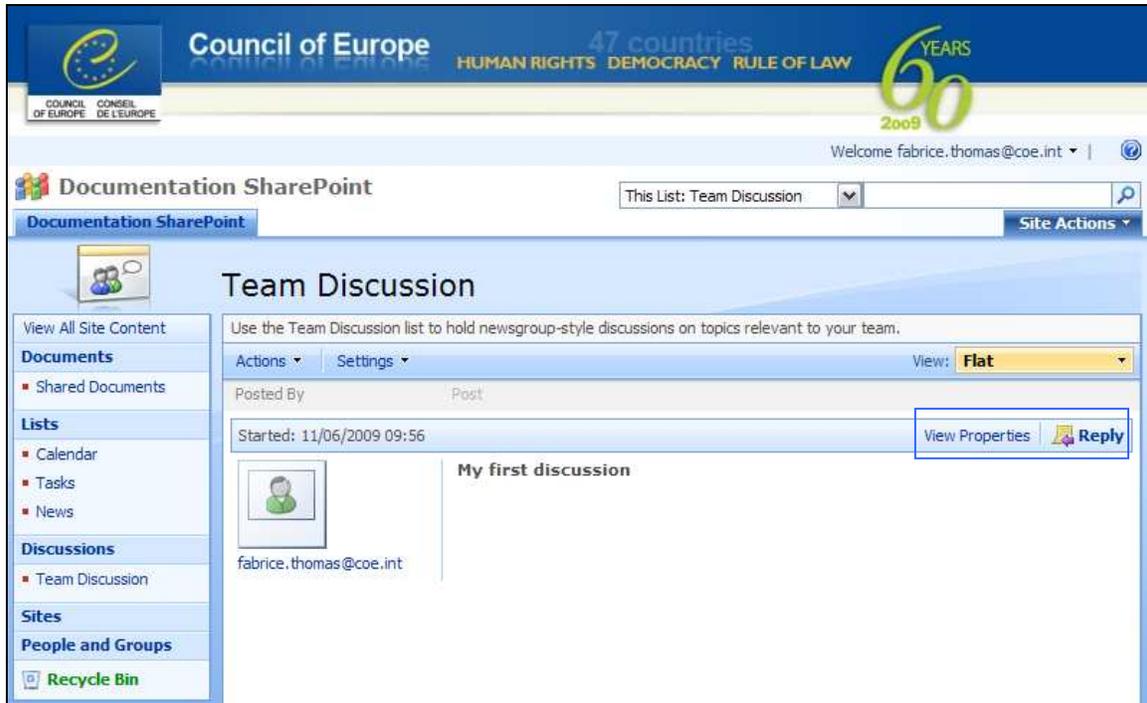


Then type the subject of the discussion and a text describing the content of the discussion, and save using the **"OK"** button.



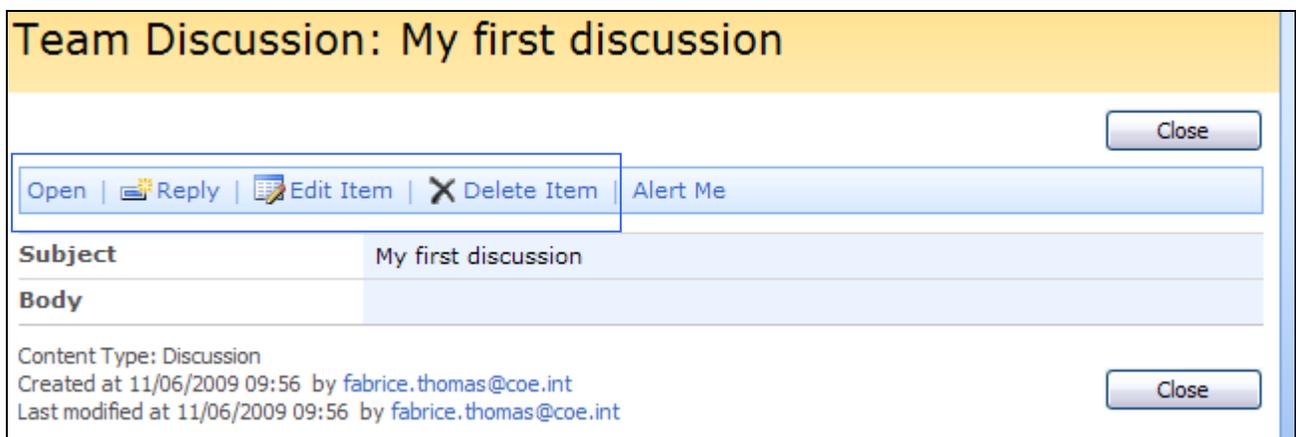
### 2.3.2. Replying to, viewing, editing or deleting a post

You can access these functionalities by clicking on the discussion subject, which will open this discussion. You can reply immediately by clicking on "**Reply**".



The screenshot shows the SharePoint interface for a 'Team Discussion'. At the top, there is a navigation bar with the Council of Europe logo, '47 countries', 'HUMAN RIGHTS DEMOCRACY RULE OF LAW', and a '60 YEARS 2009' anniversary logo. Below this is a search bar and a 'Welcome' message for 'fabrice.thomas@coe.int'. The main content area is titled 'Team Discussion' and includes a 'View All Site Content' link, a 'Documents' section with 'Shared Documents', a 'Lists' section with 'Calendar', 'Tasks', and 'News', a 'Discussions' section with 'Team Discussion', and a 'Recycle Bin' link. The discussion itself is titled 'My first discussion' and was started on '11/06/2009 09:56'. It features a user profile picture and the name 'fabrice.thomas@coe.int'. A 'View Properties' button and a 'Reply' button are visible next to the discussion title.

You can access the other functions by clicking on "**View Properties**". This will take you to a screen where you can reply, view, edit or delete a post.



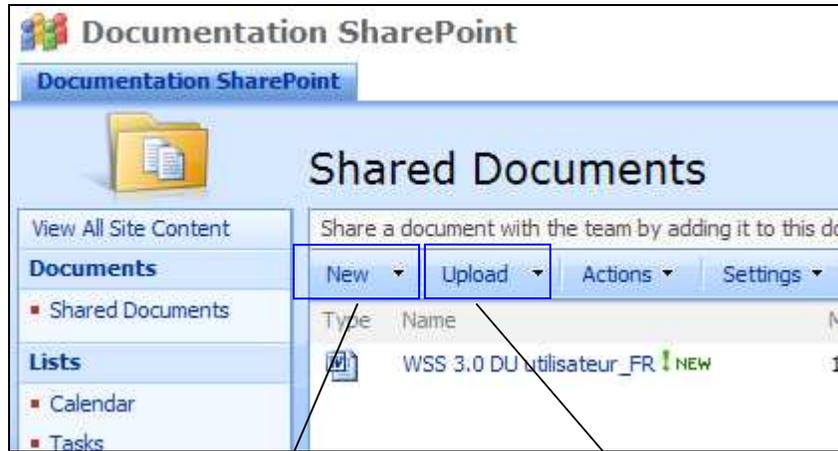
The screenshot shows the 'Team Discussion: My first discussion' properties page. At the top, there is a yellow header with the title 'Team Discussion: My first discussion' and a 'Close' button. Below the header is a navigation bar with buttons for 'Open', 'Reply', 'Edit Item', 'Delete Item', and 'Alert Me'. The main content area displays the 'Subject' as 'My first discussion' and the 'Body' as a blank space. At the bottom, there is a section for 'Content Type: Discussion' with the following details: 'Created at 11/06/2009 09:56 by fabrice.thomas@coe.int' and 'Last modified at 11/06/2009 09:56 by fabrice.thomas@coe.int'. A 'Close' button is located at the bottom right of this section.

## **2.4. Using a document library**

### **2.4.1. Adding or deleting a document**

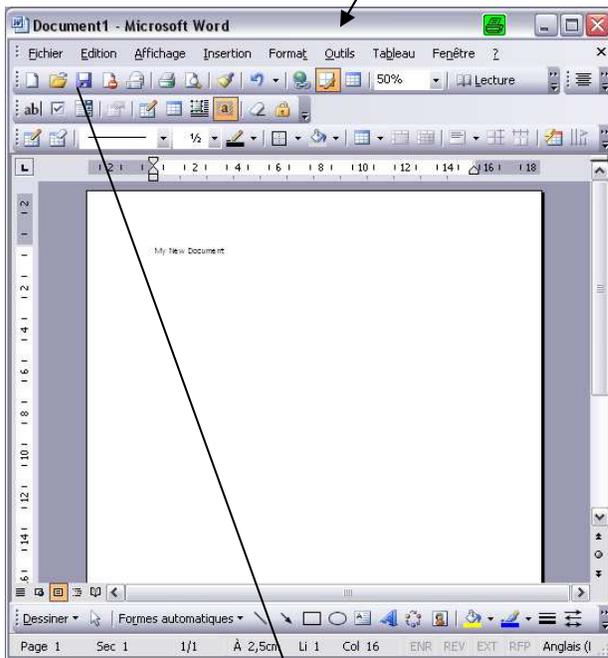
To publish a document, you must first choose which *Document Library* the document is to be deposited in. Once you have opened the list concerned, there are two possible scenarios:

- You want to create a new document
- Your document already exists

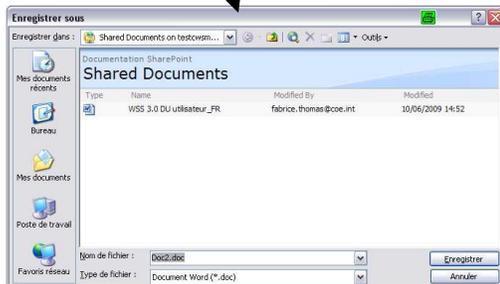
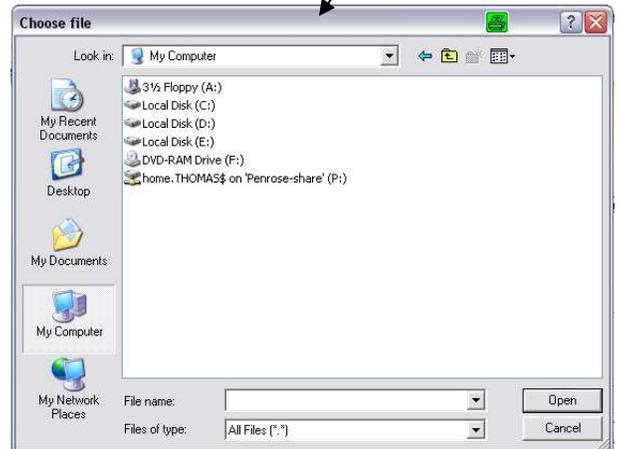
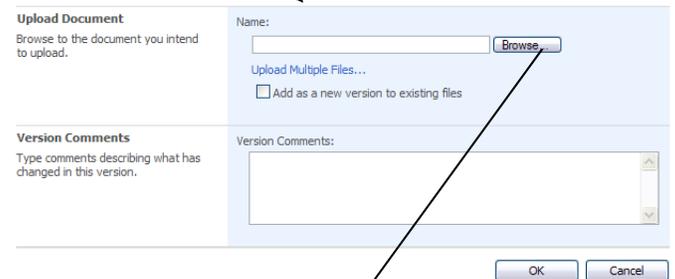


New document

Existing document



### Upload Document: Shared Documents



- If you **create a document** (by clicking on **"New"**, the document template corresponding to the list type will be opened, allowing you to edit your document in the normal way. When you click on the save button (for example in Word), you will be asked to type in the document name of your choice. You can see here that the **"Save As"** window is slightly unusual: the blue band means that you are about to record a document in SharePoint. Then validate.
- If you wish to add an **existing document** (by clicking on **"Upload"**), a page appears, prompting you to type in the access path for your document. You can click on **"Browse"** to access the Look in My computer window. Select the file, then validate the two windows (*Open* then *OK*).

The document is now present on the collaborative workspace and visible in the list:



The screenshot displays the SharePoint 'Shared Documents' library. The document 'WSS 3.0 DU utilisateur\_FR' is selected, and its context menu is visible. The menu items are:

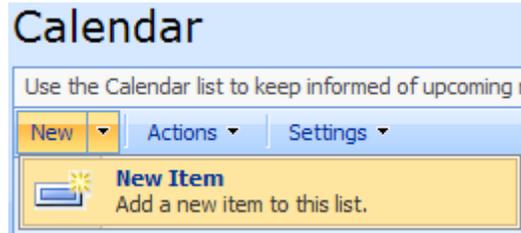
- View Properties
- Edit Properties
- Edit in Microsoft Office Word
- Delete
- Send To
- Approve/reject
- Check Out
- Version History
- Workflows
- Alert Me

Annotations in the image indicate that clicking on 'Edit Properties' leads to 'Document editing' and clicking on 'Delete' leads to 'Document deletion'.

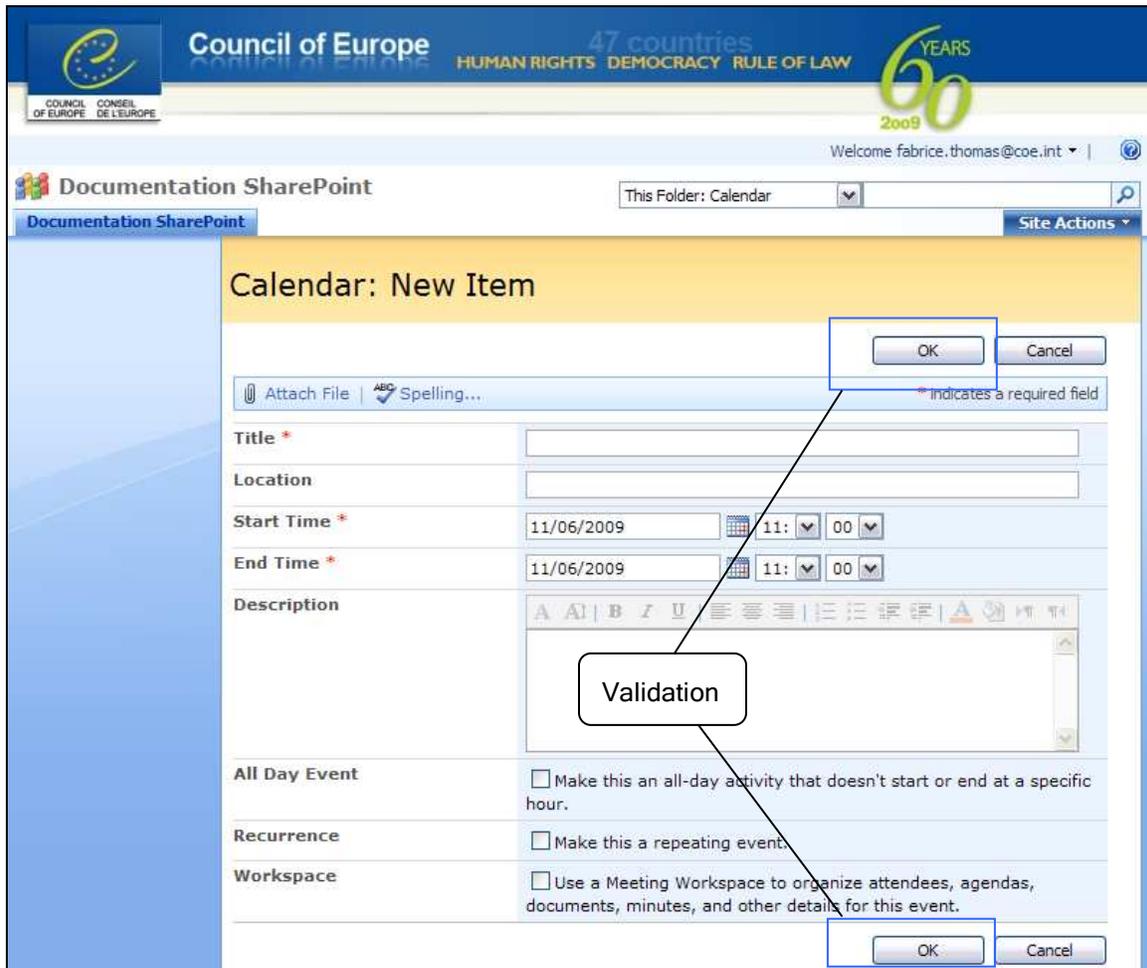
- To consult a document (without being able to modify it), simply click on its name. To modify a document, you must click on "**Edit in Microsoft Office ...**" of the context menu (and **not** on its name).
- To delete a document, simply click on "**Delete**"

## 2.5. Using a calendar

When a list is displayed, click on **"New Item"** to add a new item.



The example below shows a calendar list. The screen for adding a new item will be as follows:



Validation

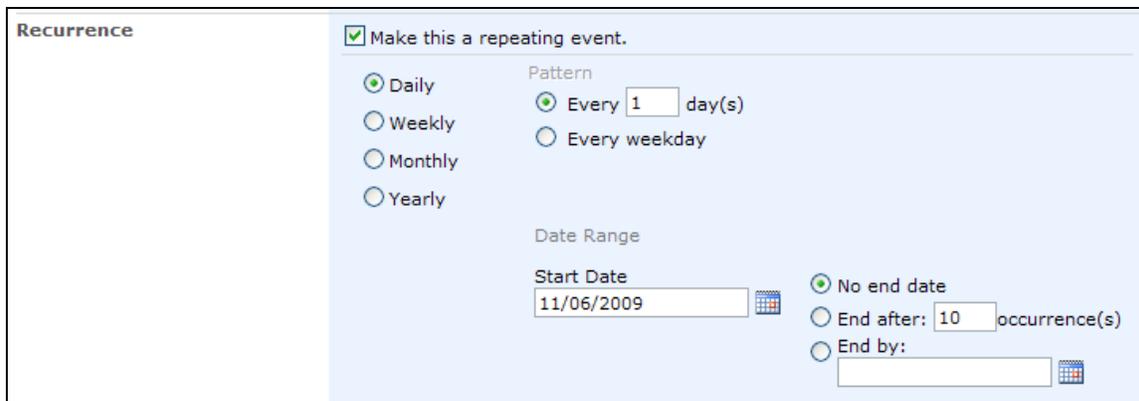
Validation

## Information Technology Department

You will then be asked to provide all the information relating to an event (Title, start date, end date, description, place and frequency).

In addition to the event title and the description you can enter a start date and end date.

You can make it a repeating event by ticking the **"Recurrence"** box (daily, weekly, monthly, yearly).



The screenshot shows a dialog box titled "Recurrence" with a light blue background. At the top left, the word "Recurrence" is written in bold. Below it, there is a checked checkbox labeled "Make this a repeating event." To the right of this checkbox, the word "Pattern" is written. Below "Pattern", there are two radio button options: "Daily" (which is selected) and "Every 1 day(s)" (with a text input field containing "1"). Below these, there is another radio button option "Every weekday". Below the "Pattern" section, the word "Date Range" is written. Below "Date Range", there is a "Start Date" label followed by a text input field containing "11/06/2009" and a calendar icon. To the right of the "Start Date" field, there are three radio button options: "No end date" (which is selected), "End after: 10 occurrence(s)" (with a text input field containing "10"), and "End by:" followed by an empty text input field and a calendar icon.

The last option on the new item screen enables you to create a Meeting Workspace for it. Workspaces will be described in the section of that name below.

Note: The fields marked with \* are obligatory.

Once you have filled in all the fields, validate by clicking on the **"OK"** button.



The screenshot shows a SharePoint site for the Council of Europe. The main content area is titled "Calendar" and contains a list of events. The list has columns for "Title" and "Location". The events listed are:

Title	Location
My Meeting Workspace !NEW	
My Meeting Workspace !NEW	
My Second Meeting !NEW	
My third Meeting !NEW	

Annotations in the image include:

- A callout box labeled "Event added" with an arrow pointing to the first event in the list.
- A callout box labeled "Context menu" with an arrow pointing to the context menu that appears when the first event is clicked. The menu options are: View Item, Edit Item, Delete Item, and Alert Me.

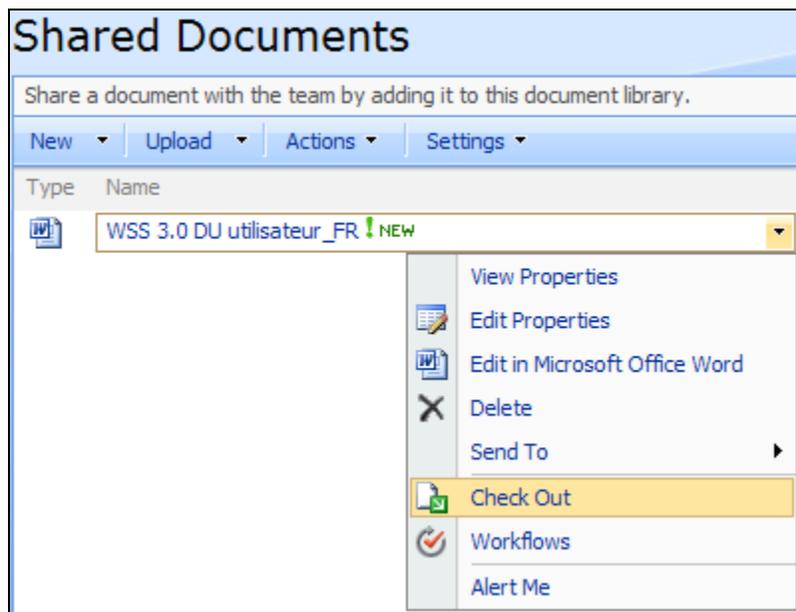
The new event has been added to the list. If you click on the title of the event, the full data for the event will be shown, but clicking on  (to the right of the title) opens up a context menu, enabling you to view the event, modify it, delete it and also receive e-mail notifications when this item is modified.

## 2.6. Connected functions

### 2.6.1. Check-out

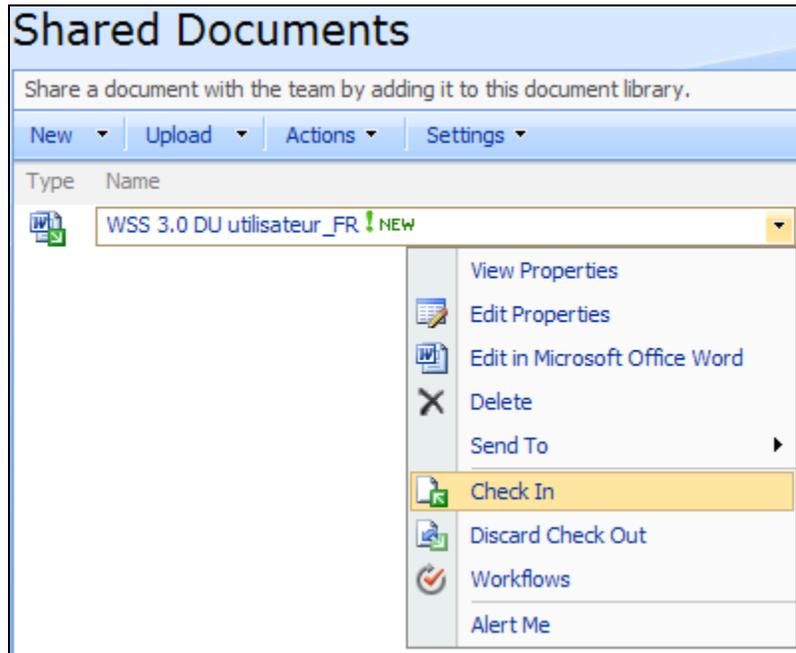
When someone is editing a document, it is crucial that no one else modifies it at the same time. If that happened, the last person to save their document would overwrite the other person's work, and those data would be lost.

Using the "**Check Out**" function overcomes this problem.



When you are planning to modify a document, click on "**Check Out**" in the context menu of the document concerned. You are now the only person with rights to write in this file. If someone was to open the document while you were editing it, they could consult it but not save any changes they made.

Once you have finished editing the document, you must select "**Check In**" to restore it to its normal state.

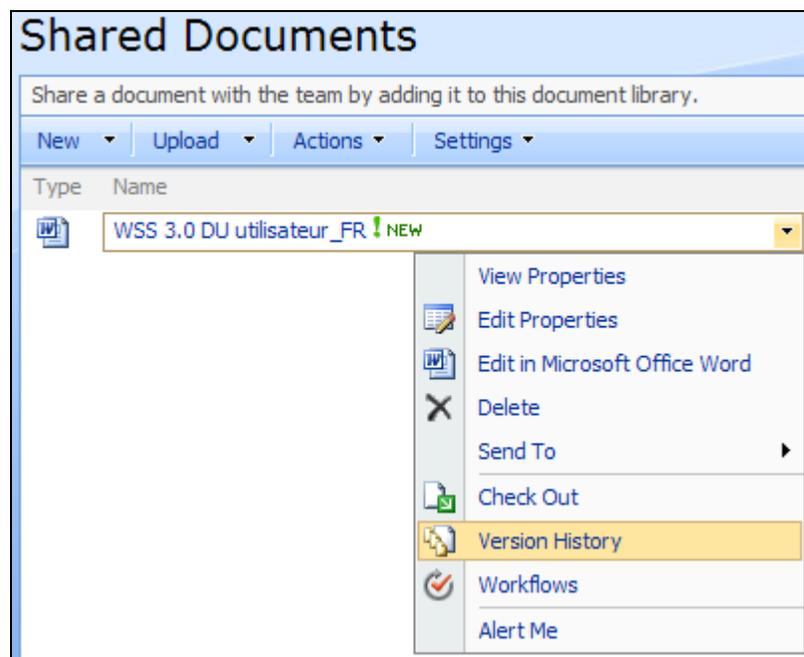


Note: You are strongly advised to use this option. Indeed, this function is indispensable for lengthy document modifications.

## 2.6.2. Version History

This option enables you to save all the successive versions of documents and allows you to restore the document as it was on a previous date.

To backtrack to a previous version of a document, click on  **"Version History"** of the context menu of the file concerned.



A list of the different versions is displayed. To display the content of each version, simply click on its date and a read-only version of the file will be opened.

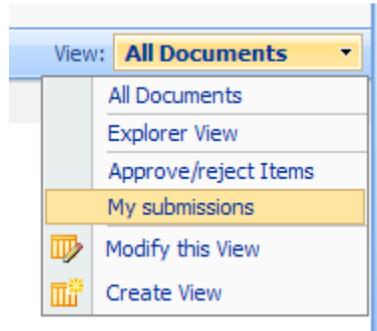
Versions saved for WSS 3.0 DU utilisateur_FR.doc				
All versions of this document are listed below with the new value of any changed properties.				
Delete All Versions				
No. ↓	Modified	Modified By	Size	Comments
2.0	10/06/2009 14:52	fabrice.thomas@coe.int	2.9 MB	
1.0	10/06/2009 14:49	fabrice.thomas@coe.int	2.9 MB	
Title		WSS 2.0 DU utilisateur_FR		

If you wish to restore a previous version, select **"Restore"** in the context menu of the desired version.

Delete All Versions				
No. ↓	Modified			
2.0	10/06/2009 14:52			
1.0	10/06/2009 14:49		View	
Title		WSS 2	Restore	

### 2.6.3. Approval

This option makes it possible to control the input of information. If approval is activated for a list, the user can submit information and then view it in "My Submissions".



They will be able to see the approval status together with any comments made by the approver.

Shared Documents						
Share a document with the team by adding it to this document library.						
New	Upload	Actions	Settings	View: My submissions		
Type	Name	Modified	Modified By	Approval Status	Approver Comments	
Approval Status : Approved (1)						
	WSS 3.0 DU utilisateur_FR <span style="color: green;">NEW</span>	10/06/2009 14:52	fabrice.thomas@coe.int	Approved		

### 3. Managing alerts

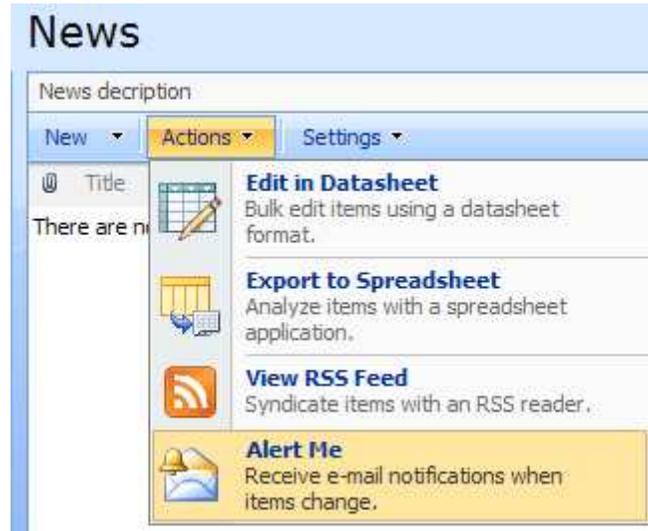
The alerts system enables you to receive e-mail notification whenever the workspace content is modified.

The alerts must be set up by the person who wants to be notified.

#### 3.1. Activating general alerts

- To set up alerts, click on **"Alert Me"**(in the **"actions"** menu).

The **"Alert Me"** option is available when you are in a document library, a discussion board or a list.



**New Alert**

Use this page to create an e-mail alert notifying you when there are changes to the specified item, document, list, or library.

[View my existing alerts on this site.](#)

<p><b>Alert Title</b> Enter the title for this alert. This is included in the subject of the e-mail notification sent for this alert.</p>	<input type="text" value="News"/>
<p><b>Send Alerts To</b> This alert will be sent to the e-mail address indicated.</p>	<p>E-mail address: Fabrice.THOMAS@coe.int</p>
<p><b>Change Type</b> Specify the type of changes that you want to be alerted to.</p>	<p>Only send me alerts when:</p> <p><input checked="" type="radio"/> All changes</p> <p><input type="radio"/> New items are added</p> <p><input type="radio"/> Existing items are modified</p> <p><input type="radio"/> Items are deleted</p>
<p><b>Send Alerts for These Changes</b> Specify whether to filter alerts based on specific criteria. You may also restrict your alerts to only include items that show in a particular view.</p>	<p>Send me an alert when:</p> <p><input checked="" type="radio"/> Anything changes</p> <p><input type="radio"/> Someone else changes an item</p> <p><input type="radio"/> Someone else changes an item created by me</p> <p><input type="radio"/> Someone else changes an item last modified by me</p>
<p><b>When to Send Alerts</b> Specify how frequently you want to be alerted.</p>	<p><input checked="" type="radio"/> Send e-mail immediately</p> <p><input type="radio"/> Send a daily summary</p> <p><input type="radio"/> Send a weekly summary</p> <p>Time:  <input type="text" value="Thursday"/> <input type="text" value="11:00"/></p>

- Your e-mail address is shown in the **"Send Alerts to"** field, and other users can be added
- Indicate the type of modification and the alert frequency, then validate by clicking on the **"OK"** button.

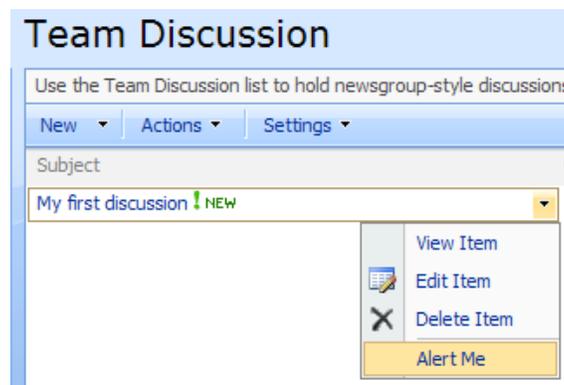
NB: the **"Send Alerts for these Changes"** menu enables you to filter the alerts, so that you are not alerted to your own changes to a document, for example, or to restrict alerts to changes to documents you have created.

## 3.2. Setting up specific alerts

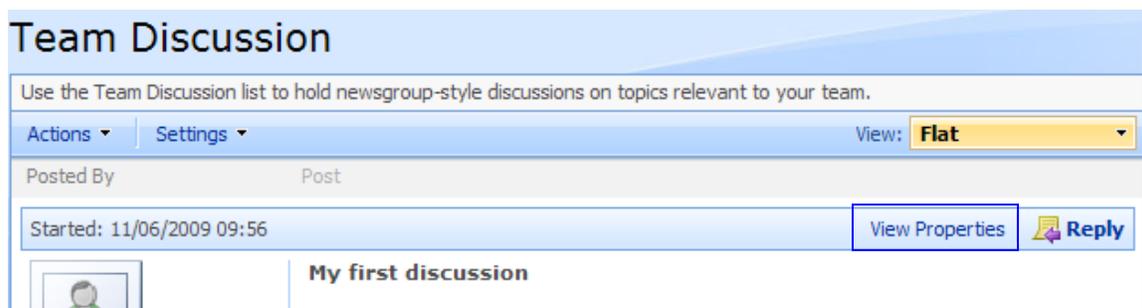
### 3.2.1. Within a discussion board

An alert may be made specific to a discussion or a particular post.

To make it specific to a discussion, place the cursor on the desired discussion subject and click on **"Alert Me"** in the drop-down menu (see below)



To make it specific to a post: click on **"View Properties"**:



and then on **"Alert Me"**

## Team Discussion: My first discussion

Open |  Reply |  Edit Item |  Delete Item | Alert Me

<b>Subject</b>	My first discussion
<b>Body</b>	

Content Type: Discussion  
Created at 11/06/2009 09:56 by [fabrice.thomas@coe.int](mailto:fabrice.thomas@coe.int)  
Last modified at 11/06/2009 09:56 by [fabrice.thomas@coe.int](mailto:fabrice.thomas@coe.int)

Then choose the filter, the desired frequency and validate the alert with the "OK" button.

## New Alert

Use this page to create an e-mail alert notifying you when there are changes to the specified item, document, list, or library.

[View my existing alerts on this site.](#)

<b>Alert Title</b> Enter the title for this alert. This is included in the subject of the e-mail notification sent for this alert.	<input type="text" value="Team Discussion: My first discussion"/>
<b>Send Alerts To</b> This alert will be sent to the e-mail address indicated.	E-mail address: <input type="text" value="Fabrice.THOMAS@coe.int"/>
<b>Change Type</b> Specify the type of changes that you want to be alerted to.	Only send me alerts when: <input checked="" type="radio"/> All changes <input type="radio"/> New items are added <input type="radio"/> Existing items are modified <input type="radio"/> Items are deleted
<b>Send Alerts for These Changes</b> Specify whether to filter alerts based on specific criteria. You may also restrict your alerts to only include items that show in a particular view.	Send me an alert when: <input checked="" type="radio"/> Anything changes <input type="radio"/> Someone else changes a post <input type="radio"/> Someone else changes a post created by me <input type="radio"/> Someone else changes a post last modified by me
<b>When to Send Alerts</b> Specify how frequently you want to be alerted.	<input checked="" type="radio"/> Send e-mail immediately <input type="radio"/> Send a daily summary <input type="radio"/> Send a weekly summary Time: <input type="text" value="Thursday"/> <input type="text" value="11:00"/>

### 3.2.2. Within a document library



Share a document with the team by adding it to this document library.

Type	Name	Modified	Modified By
	WSS 3.0 DU utilisateur_FR <span style="color: green;">NEW</span>	10/06/2009 14:52	fabrice.thomas@coe.int

- View Properties
- Edit Properties
- Edit in Microsoft Office Word
- Delete
- Send To
- Approve/reject
- Check Out
- Version History
- Workflows
- Alert Me

Then choose the filter, the desired frequency and validate the alert with the **"OK"** button.

## New Alert

Use this page to create an e-mail alert notifying you when there are changes to the specified item, document, list, or library.

[View my existing alerts on this site.](#)

OK Cancel

<p><b>Alert Title</b> Enter the title for this alert. This is included in the subject of the e-mail notification sent for this alert.</p>	<input type="text" value="Shared Documents: WSS 3.0 DU utilis"/>
<p><b>Send Alerts To</b> This alert will be sent to the e-mail address indicated.</p>	<p>E-mail address: Fabrice.THOMAS@coe.int</p>
<p><b>Send Alerts for These Changes</b> Specify whether to filter alerts based on specific criteria. You may also restrict your alerts to only include items that show in a particular view.</p>	<p>Send me an alert when:</p> <p><input checked="" type="radio"/> Anything changes</p> <p><input type="radio"/> Someone else changes a document</p> <p><input type="radio"/> Someone else changes a document created by me</p> <p><input type="radio"/> Someone else changes a document last modified by me</p>
<p><b>When to Send Alerts</b> Specify how frequently you want to be alerted.</p>	<p><input checked="" type="radio"/> Send e-mail immediately</p> <p><input type="radio"/> Send a daily summary</p> <p><input type="radio"/> Send a weekly summary</p> <p>Time:  <input type="text" value="Thursday"/> <input type="text" value="11:00"/></p>

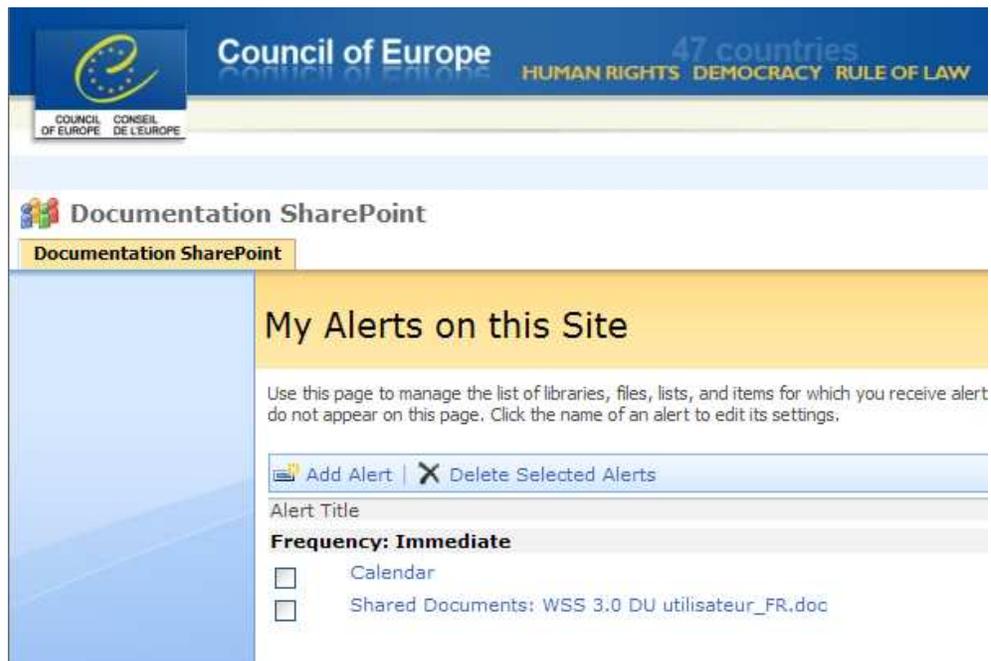
OK Cancel

### 3.3. Managing alerts

To view all your alerts, click on the *"view my existing alerts on this site"* link at the top of the alert creation page.



A summary of the alerts set up on the site is shown in the example below.

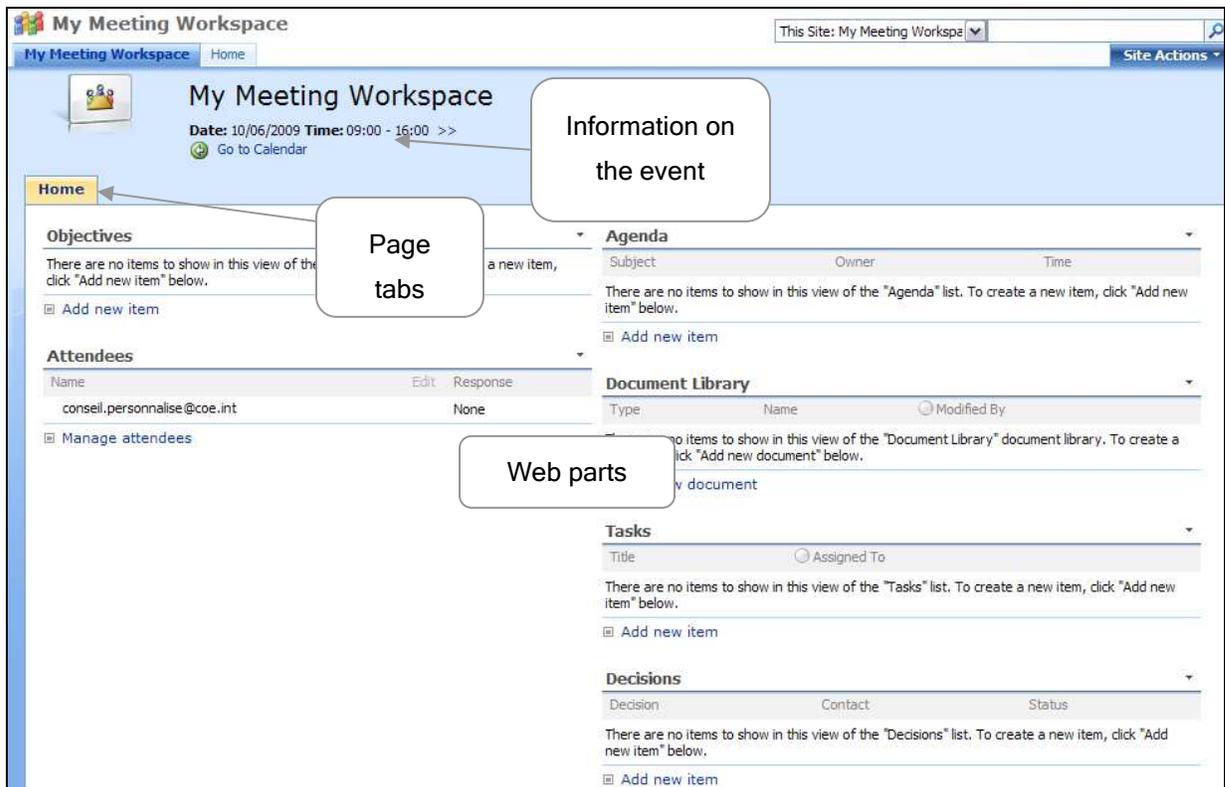


To delete an alert, tick the corresponding box and click on *"Delete Selected Alerts"*.

## 4. Workspaces

The meeting workspace is linked to one or more meetings, enabling the players to gather the documents, agendas and tasks relating to the meeting(s).

The workspace looks very much like a standard teamworking site:



The screenshot shows a SharePoint workspace titled "My Meeting Workspace". At the top, it displays the meeting date and time: "Date: 10/06/2009 Time: 09:00 - 16:00 >>". Below this, there are several web parts: "Objectives", "Attendees" (with a table listing attendees), "Agenda", "Document Library", "Tasks", and "Decisions". A "Home" page tab is visible on the left. Three callout boxes are present: "Information on the event" points to the date/time information; "Page tabs" points to the "Home" tab; and "Web parts" points to the "Agenda" web part.

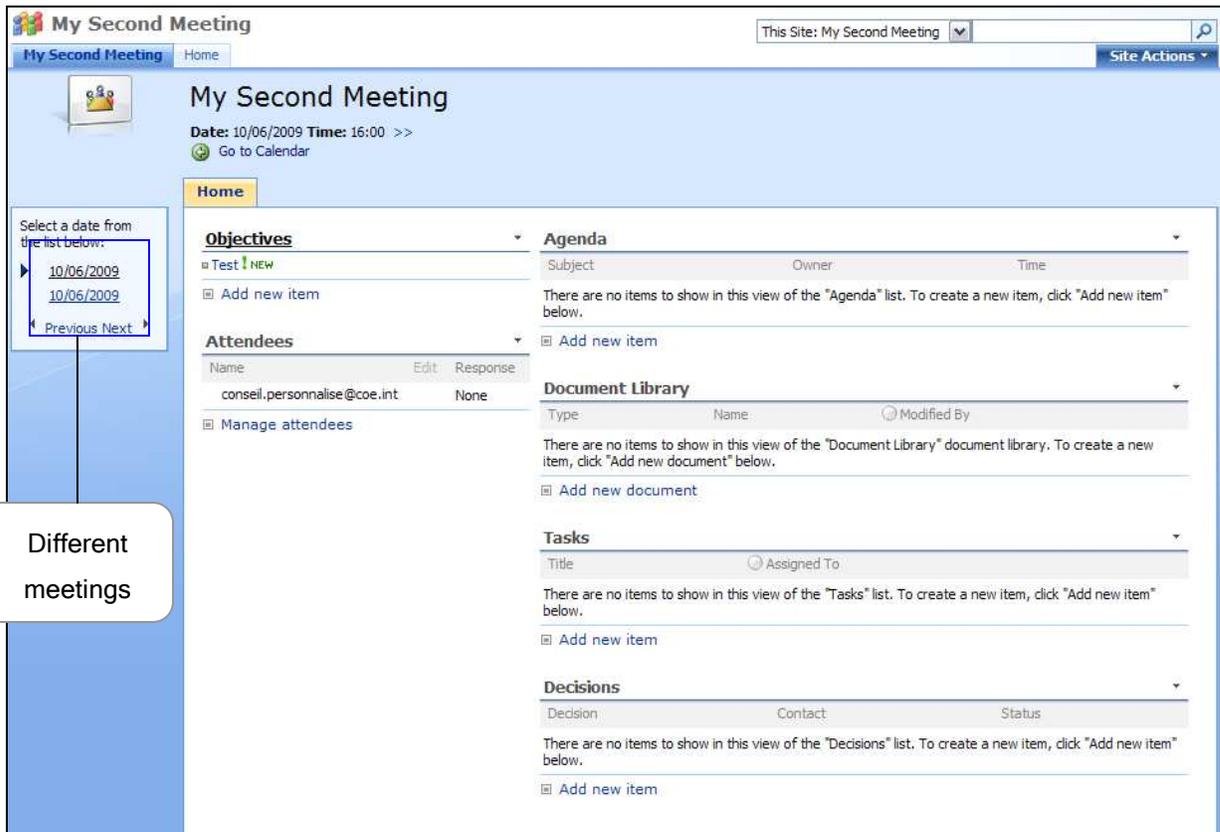
Name	Edit	Response
conseil.personnalise@coe.int		None

Decision	Contact	Status
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You can see that the information for the event linked to this workspace is displayed, and a set of lists (in the form of web parts) has been added automatically.

This workspace functions in the same way as the root SharePoint site, with the sole difference that it has no welcome page.

The workspace may be linked to several events. The different events are displayed on the screen by their respective date:



The screenshot shows a SharePoint meeting page for "My Second Meeting". The page includes a date and time (10/06/2009, 16:00) and a "Go to Calendar" link. The main content area is divided into several sections: Objectives, Attendees, Agenda, Document Library, Tasks, and Decisions. A date picker is overlaid on the left side, showing a list of dates with "10/06/2009" selected. A callout box labeled "Different meetings" points to the date picker.

You can switch between meetings by clicking on the relevant date.