

R22003

TRANSFORMING MYJJC PORTAL TO A CLOUD ARCHITECTURE

SUPPORTING DOCUMENTATION

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MYJJC Portal



The MYJJC portal (<https://my.jjc.edu>) is JJC's student and staff portal.

The portal is built using the *Ellucian Portal* product to create an on premise Sharepoint intranet site for student and staff.



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MYJJC Portal Architecture

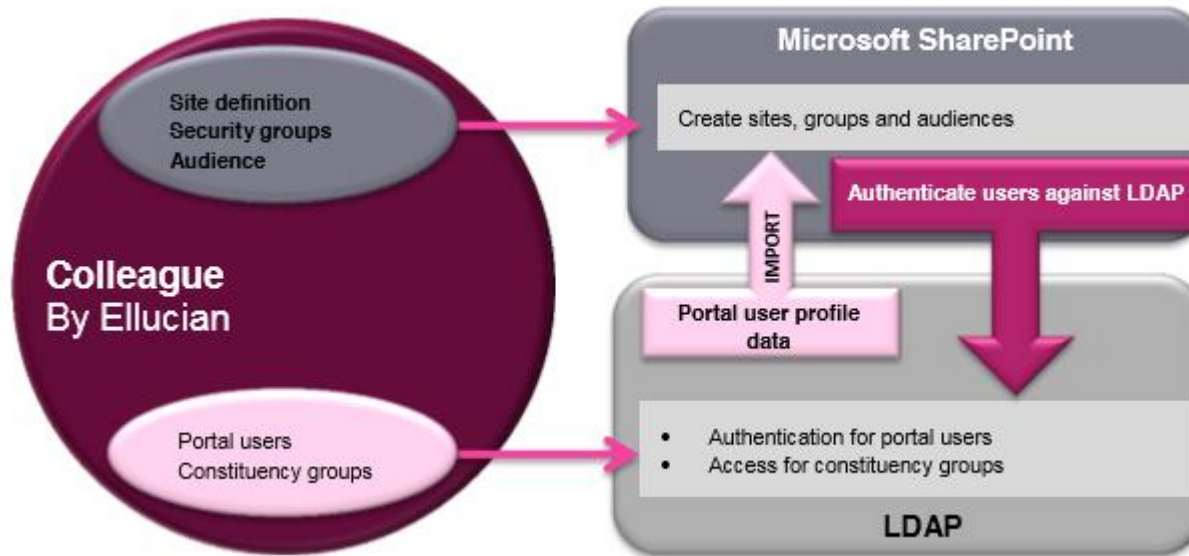


Ellucian Portal is a set of interactions among several software components, including:

- **Microsoft SharePoint portal:** A database layer and web front-end layer
- **Ellucian Colleague:** The back-end data used by Microsoft SharePoint
- **Lightweight Directory Access Protocol (LDAP):** Provides authentication and access information to Microsoft SharePoint

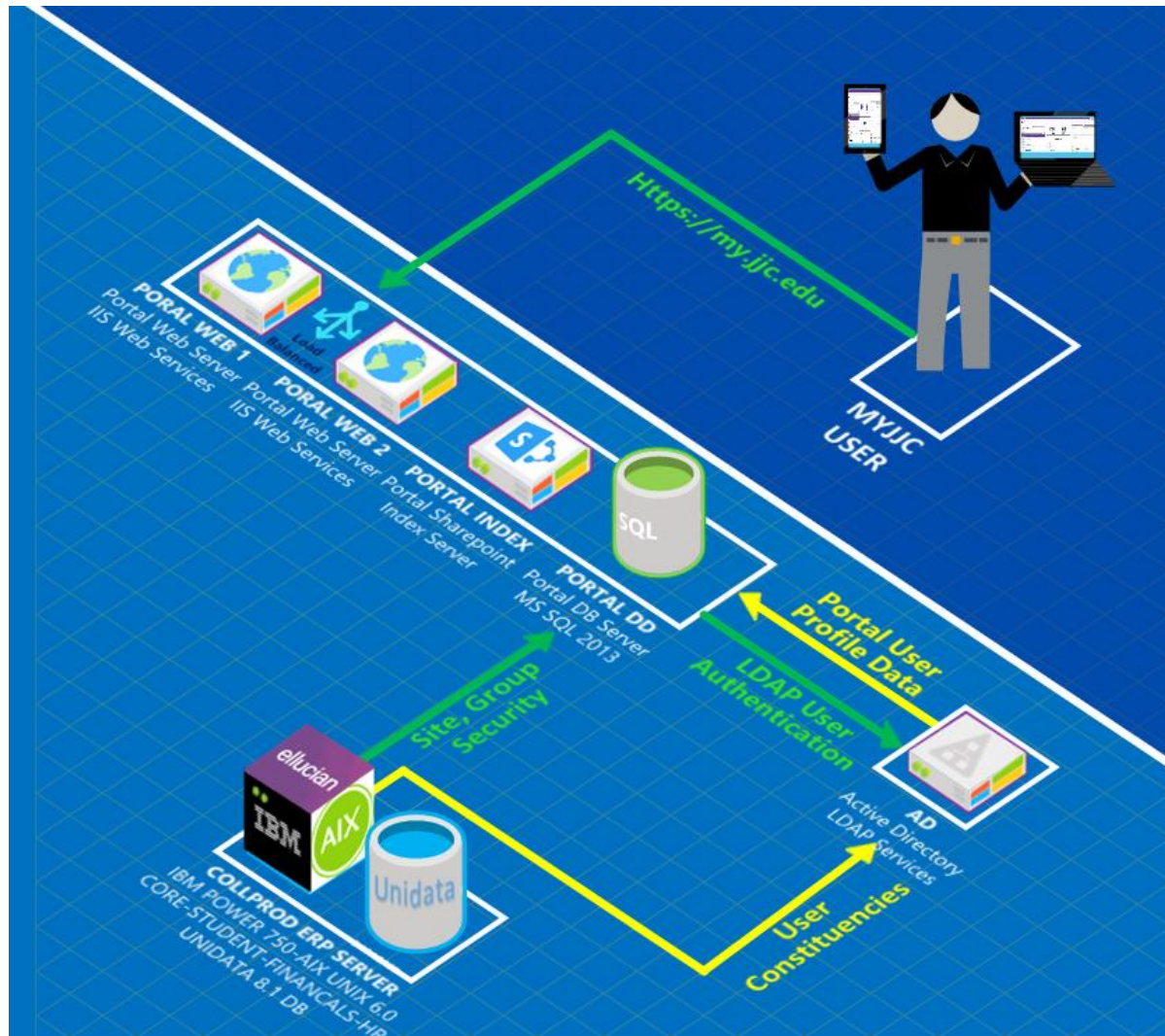


Colleague ERP -> Portal



- Colleague populates the directory service (via LDAP) with user information and portal constituency group information, which controls the access portal users will have.
- Colleague also populates Microsoft SharePoint with information to build and manage site, audience, and user profile information.





MYJJC Portal Architecture



Ellucian Portal Components



A screenshot of the Ellucian Portal interface. The top navigation bar is purple with 'MY JJC' and a user profile 'Roessler, Timothy'. Below the navigation bar, there's a 'Home' link and a search bar. The main content area is divided into several sections: 'Email' (showing 10809 unread messages), 'My Week' (calendar for June 10th), 'HR' (Human Resources) with links to Benefits and Labor Relations, 'Hiring & Recruiting' with a link to Documents, 'Tools' (25Live Event Scheduling, Manage Emergency Profile, Transferology, Student Laptop Referral), 'On Site Tools' (Campaign Request Form, Academic Success Tracker, Online Student Support Services, Curriculum), 'Canvas Courses' (Timothy Roessler's Sandbox, Learning Technology Advisory Team), 'Testing Resources' (Placement Testing, Submit Makeup Exam, Submit iCampus Exam), and 'Announcements' (President's Diversity and Inclusion Council Update).

The *Ellucian Portal* is built on Microsoft SharePoint so it looks like a typical website and 'drives' much like other Microsoft products. Ellucian delivers several components that append to Microsoft SharePoint functionality as well as some new features in Colleague that provide additional integration and configurations for the Ellucian Portal. The most noticeable of these components is through Web Parts, 'containers' used to display information.



Questions?

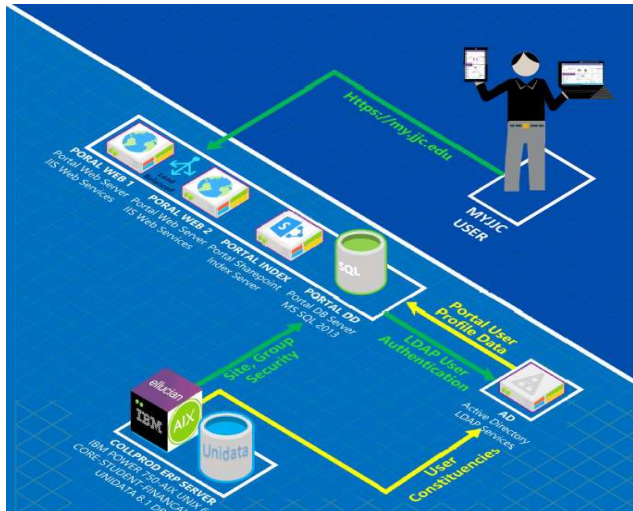


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Server Role	Windows Patching (p	SQL Patching	SharePoint Patching	PROCESSOR NAME	OPERATING SYSTEM	RAM	C:	D:	E:	F:	Type	Server Role	Comments
Database server	YES	NO	NO	Intel Xeon CPU E5-2630 - 10 Core, 20 LPs - 2	Windows Server 2012 R2 Standard (x64)	128 GB	557 GB	1.63 TB	530 GB	N/A	Physical Server	Database server	
App Server (portal index)	YES	N/A	YES	Intel Xeon CPU E5-2680 - 4 Core, 4 LPs	Windows Server 2012 R2 Standard (x64)	18 GB	80 GB	N/A	40 GB	N/A	Virtual Server	App Server (portal index)	
Distributed Cache Server	YES	N/A	YES	Intel Xeon CPU E5-2680 - 12 Core, 24 LPs - 2	Windows Server 2012 R2 Standard (x64)	128 GB	930 GB	1.08 TB	N/A	N/A	Physical Server	Distributed Cache Server	
WFE	YES	N/A	YES	Intel Xeon CPU E5-2620 - 10 Core, 16 LPs	Windows Server 2012 R2 Standard (x64)	64 GB	170 GB	N/A	386 GB	N/A	Physical Server	WFE	
WFE	YES	N/A	YES	Intel Xeon CPU E5-2620 - 10 Core, 16 LPs	Windows Server 2012 R2 Standard (x64)	64 GB	170 GB	N/A	386 GB	N/A	Physical Server	WFE	



Name	URL	Admin URL	What is it?	Description/Connection	Has Workflow	Sends Email
Constituency/Redirection	my.jjc.edu		Ellucian Feature	if fac/staff user logs in, they will be redirected to fac/staff portal section, if student logs in, they will be directed to student section	No	No
Announcements webpart	https://my.jjc.edu/facstaff/Pages/default.aspx		Ellucian Feature	webpart that displays list items in a calendar view, displays according to settings and then removes items once time has passed.	No	No
Announcements list	https://my.jjc.edu/facstaff/Lists/DataTelPortalAnnouncements/NewForm.aspx		SharePoint Form	form to collect announcement data	No	No
Campus Events webpart	https://my.jjc.edu/facstaff/Pages/default.aspx		Ellucian Feature	webpart that displays list items in a calendar view, displays according to settings and then removes items once time has passed.	No	No
Campus Events	https://my.jjc.edu/facstaff/Lists/Calendar/NewForm.aspx?Source=https%3A%2F%2Fmy%2Ejjc%2Eedu%2Ffacstaff%2FPages%2Fdefault%2Easpx		SharePoint Form	form to collect event data	No	No
Email Webpart	my.jjc.edu		Ellucian Feature	webpart that displays the users unread messages and a link to SSO them into o365	No	No
My Week Webpart	my.jjc.edu		Ellucian Feature	webpart that pulls users appointments and meetings from outlook and displays them	No	No
Self Service Menu	my.jjc.edu		Ellucian Feature	webpart that displays all the options from self service	No	No
My Team Sites	my.jjc.edu		Ellucian Feature	Welpart that displays all the team sites a user has permissions to be a part of	No	No
Makeup Exam Submission	https://my.jjc.edu/faculty-staff/testing-services/Lists/Test%20Submission/new.aspx		Customized SharePoint Form	Form for instructors to attach and submit make up tests for students	Yes	Yes
Makeup Exam Submission View	https://my.jjc.edu/faculty-staff/testing-services/Lists/Test%20Submission/allitems.aspx		SharePoint Form	view that displays all submissions for testing services employees to view/edit those submissions by the instructors. Has custom sorting and filtering. Permissions handled by sharepoint	No	No
iCampus Exam Submission	https://my.jjc.edu/faculty-staff/testing-services/Lists/iCampus%20Test%20Submission/NewForm.aspx		Customized SharePoint Form	Form for instructors to attach and submit make up tests for students	Yes	Yes
iCampus Exam Submission view	https://my.jjc.edu/faculty-staff/testing-services/Lists/iCampus%20Test%20Submission/allitems.aspx		SharePoint Form	view that displays all submissions for testing services employees to view/edit those submissions by the instructors. Has custom sorting and filtering. Permissions handled by sharepoint	No	No
icampus webpart	my.jjc.edu		Custom Usercontrol	Built by AQL to pull all user data (instructors) classes to a quick view links. SSO's the user into iCampus.	No	No
25Live	https://25live.collegenet.com/jjc		SSO Link	SSO's user to 25Live	No	No
Academic Success Tracker	https://jjc.gradesfirst.com/		SSO Link	SSO's user to Success Tracker	No	No
Transferology	https://www.transferologylab.com/login.htm		SSO Link	SSO's user to Transferology	No	No
Halogen	https://global.hgnccloud.com/jjcd525/welcome.jsp		SSO Link	SSO's user to Halogen	No	No
Not Anymore Training	https://studentsuccess.org/SSO/jjc		SSO Link	SSO's user to employee training	No	No
SARS Anywhere	http://vdcsars001/SARSAnywhere/Login.aspx?ReturnUrl=%2FSARSAnywhere%2F		SSO Link	Link to internal server		
Email/account lookup	https://eresources.jjc.edu/cgi-bin/wwwiz.exe/wwwiz.asp?wwizmstr=JJC.EMAIL.PASSWORD.WEB		Webwiz Program	webwiz to drupal 8	No	Yes
Core Values Form	https://my.jjc.edu/committees/core-values/nomination-form/Pages/default.aspx	https://my.jjc.edu/forms/core-values/Pages/default.aspx	Custom Application	Form to collect info to nominate an employee. Form grabs a PDF hosted on a regular http address and writes the form data to the PDF and emails that to Amy Stevens and the nominee. Writes info to Azure DB and has other pages controlled with sharepoint permissions to display all, one, or export submissions	Yes	Yes
Capanign Request Form	https://my.jjc.edu/departments/communication-center/Lists/Campaign%20Request/hewform.aspx		SharePoint Form	Collects info for a communication campaign and emails the form owners	Yes	Yes
United Way Combined Giving	https://my.jjc.edu/faculty-staff/human-resources/Pages/united-way-combined-charities-giving-campaign.aspx		Custom Usercontrol	Employees can signup to donate. Form collects user data for donations. If 'other' is selected another dropdown appears and displays a list the admins are able to control with another form. They can add/delete/update the funds.	No	Yes
Employee Giving Form	https://my.jjc.edu/faculty-staff/Pages/payroll-deduction.aspx	https://my.jjc.edu/forms/foundation/Pages/view-funds.aspx	Custom Application	(https://my.jjc.edu/forms/foundation/Pages/view-funds.aspx) One the employee submits the form, they results are emailed and sent to a view for the admins to control. Has employee form, admin add/edit form, view/export results form	No	Yes
Major Exploration Fair Signup	https://my.jjc.edu/faculty-staff/career-services/Pages/major-exploration-fair-form.aspx	https://my.jjc.edu/forms/Major-Exploration-Fair/Pages/default.aspx	Custom Application	Form for staff to signup to send someone from their department to a table to work the fair. Connects to Azure displays the department list for employees to select. Admin view to see all results	No	Yes
Data Request Form	https://my.jjc.edu/faculty-staff/forms/Pages/data-request-form.aspx	https://my.jjc.edu/forms/oire/Pages/default.aspx	Custom Application	Form to collect user input, can also attach file. File gets attached and email notice sent out. Sends data to Azure. Has view all view	No	Yes
General Petition Form	?? I think they are using maxient now	**Last data is from 2018	Custom Application	Students would fill out the form and the data would be sent to a custom view with options for staff to approve or deny the request.	No	Yes
Photo ID Application	https://my.jjc.edu/student-services/photo-id-services/Pages/photo-id-application.aspx	https://my.jjc.edu/forms/StudentPhotoID/Pages/default.aspx	Custom Application	https://my.jjc.edu/forms/registration-petition/Pages/default.aspx	No	Yes
TLC Workshop Survey	https://my.jjc.edu/student-services/tlc/Pages/workshop-survey.aspx	https://my.jjc.edu/forms/tlc-survey/Pages/default.aspx	Custom Application	Students fill out the form and the results are sent to a view all view where staff can view/delete the submission	No	Yes
Vendor Evaluation	https://my.jjc.edu/faculty-staff/bus-aux/Pages/vendor-eval.aspx	Does not appear to be utilized	Custom Application	form students fill out to evaluate TLC workshops. Staff side has views to control workshop names, tutors, and view/export results https://my.jjc.edu/forms/tlc-survey/Pages/default.aspx	No	Yes
Furnature Evaluation form	https://my.jjc.edu/faculty-staff/bus-aux/Pages/furniture-replacement-eval.aspx		Custom Usercontrol	form for employees to evaluate vendors. Admin view displays results, and lets them search by date, bid/quote/company name.	No	Yes

Name	URL	Admin URL	What is it?	Description/Connection	Has Workflow	Sends Email
Training Evaluation form	https://my.jjc.edu/faculty-staff/bus-aux/Pages/training-course-eval.aspx		Custom Usercontrol	simple survey that emails results	No	Yes
WELF	https://my.jjc.edu/welf-secure/Pages/default.aspx		Custom Usercontrol	creates a random string that is verified with a webwiz program to grant users access to the WELF process. The links access is controlled by SharePoint permissions	No	No
Test WELF	https://my.jjc.edu/welf-secure/Pages/test-welf.aspx		Custom Usercontrol	creates a random string that is verified with a webwiz program to grant users access to the test WELF process. The links access is controlled by SharePoint permissions	No	No
Additional Funds Request	https://my.jjc.edu/faculty-staff/budget-forms/Lists/Additional%20Funds%20Request/newform1.aspx		Customized SharePoint Form	Has approval process and sends emails, and has custom SharePoint view	Yes	Yes
Annual Capital Improvement	https://my.jjc.edu/faculty-staff/budget-forms/Lists/Annual%20Capital%20Improvement%20Form/newform1.aspx		Customized SharePoint Form	Has approval process and sends emails, and has custom SharePoint view	Yes	Yes
Change in Position Request	https://my.jjc.edu/faculty-staff/budget-forms/Lists/Change%20in%20Position%20Request/newform1.aspx		Customized SharePoint Form	Has approval process and sends emails, and has custom SharePoint view	Yes	Yes
Change in Program/Project Responsibility	https://my.jjc.edu/faculty-staff/budget-forms/Lists/Change%20in%20ProgramProject%20Responsibility/newform1.aspx		Customized SharePoint Form	Has approval process and sends emails, and has custom SharePoint view	Yes	Yes
Detail of line items over 1000	https://my.jjc.edu/faculty-staff/budget-forms/Lists/Detail%20of%20Line%20Items%20Over%201000/newform1.aspx		Customized SharePoint Form	sends emails based on attachments, and has custom SharePoint view	Yes	Yes
Equipment Request	https://my.jjc.edu/faculty-staff/budget-forms/Lists/Equipment%20Request/newform1.aspx		Customized SharePoint Form	Has approval process and sends emails, and has custom SharePoint view	Yes	Yes
New Position Request	https://my.jjc.edu/faculty-staff/budget-forms/Lists/New%20Position%20Request/newform1.aspx		Customized SharePoint Form	Has approval process and sends emails, and has custom SharePoint view	Yes	Yes
Furniture Request	https://my.jjc.edu/faculty-staff/budget-forms/Lists/Furniture%20Request/newform1.aspx		Customized SharePoint Form	Has approval process and sends emails, and has custom SharePoint view	Yes	Yes
Technology Project Request	https://my.jjc.edu/faculty-staff/budget-forms/Pages/fund-numbers.aspx		Customized SharePoint Form	Has approval process and sends emails, and has custom SharePoint view	Yes	Yes
Fund Codes	https://my.jjc.edu/faculty-staff/budget-forms/Pages/dept-numbers.aspx		SharePoint Form	List showing all codes, curated by department for employee use	No	No
Department Codes	https://my.jjc.edu/faculty-staff/budget-forms/Pages/dept-numbers.aspx		SharePoint Form	List showing all codes, curated by department for employee use	No	No
Object Codes	https://my.jjc.edu/faculty-staff/budget-forms/Pages/acc-number.aspx		SharePoint Form	List showing all codes, curated by department for employee use	No	No
Adjunct Faculty Contract	https://my.jjc.edu/faculty-staff/adjunct-faculty/Pages/contract-agreement-forms.aspx	https://my.jjc.edu/apps/adjunct-contract/Pages/default.aspx	Custom Application	Employee form sends email and collects data and puts into admin view on another site controlled by sharepoint permissions. Can edit/view/print submissions. Will need to contact owners for specific use	No	Yes
Academic Probation Groups	https://my.jjc.edu/student-services/counseling/Pages/apgroup.aspx	https://my.jjc.edu/apps/academic-probation/Pages/default.aspx	Custom Application	permissions controlled by sharepoint. https://my.jjc.edu/apps/academic-probation/Pages/default.aspx Admins can view submissions, add/edit sessions that the user signs up for form to signup for a seminar that is input by admins with the backend form. Admins can also send email reminders, add/edit/delete seminars.	No	Yes
Adjunct Faculty Seminars	https://my.jjc.edu/faculty-staff/adjunct-faculty/Pages/registration.aspx	https://my.jjc.edu/apps/adjunct-seminars/Pages/default.aspx	Custom Application	form to collect adjunct faculty seminar suggestions	No	Yes
Suggest a Seminar	https://my.jjc.edu/faculty-staff/adjunct-faculty/Lists/suggestaseminar/NewForm.aspx		SharePoint Form	Form for instructors to lookup class scheduals, connects to Azure DB which gets class info from Colleague. This info is exported from Colleague DB into a folder and there are scheduled jobs in SQL to insert and update the info	Yes	Yes
Class Lookup	https://my.jjc.edu/faculty-staff/adjunct-faculty/Pages/class-lookup.aspx		Custom Usercontrol	Students can sign up for a career service session. Admins have the ability to view/edit/add/delete sessions and email students from the admin UI	No	No
Undecided Student Sessions	? Not sure it is currently in use admin panel - https://my.jjc.edu/apps/undecided-student-sessions/Pages/default.aspx	https://my.jjc.edu/apps/undecided-student-sessions/Pages/default.aspx	Custom Application	Form for employees to submit proposals for professional development seminars	No	Yes
Submit a Proposal	https://my.jjc.edu/faculty-staff/human-resources/ppd/Lists/ProposePDSession/New.aspx		Customized SharePoint Form	form for employees to register for a professional development session. Admins control session list for registration options	Yes	Yes
Register for a session	https://my.jjc.edu/faculty-staff/human-resources/ppd/Lists/RegisterforSessions/NewForm.aspx		SharePoint Form	students fill out the form and disabilities services staff gets notified through email and edit the form submission entity as they work through their work process to handle the request. They use the custom sharepoint view to track and filter requests.	Yes	Yes
DS - Request Notice of Accommodation	https://my.jjc.edu/faculty-staff/human-resources/ppd/Lists/RegisterforSessions/NewForm.aspx		Customized SharePoint Form	students fill out the form and disabilities services staff gets notified through email and edit the form submission entity as they work through their work process to handle the request. They use the custom sharepoint view to track and filter requests.	Yes	Yes
DS - Request for Test or Quiz Accommodations	https://my.jjc.edu/student-services/disability-services/Lists/RequestForAccommodations/new.aspx		SharePoint Form	students fill out the form and disabilities services staff gets notified through email and edit the form submission entity as they work through their work process to handle the request. They use the custom sharepoint view to track and filter requests.	Yes	Yes
DS - Request for Alt/Electronic Text	https://my.jjc.edu/student-services/disability-services/Lists/alternatetextformatrequest/new.aspx		SharePoint Form	students fill out the form and disabilities services staff gets notified through email and edit the form submission entity as they work through their work process to handle the request. They use the custom sharepoint view to track and filter requests.	Yes	Yes
DS - Notetaker Request	https://my.jjc.edu/student-services/disability-services/Lists/notetaker-request/new.aspx		Customized SharePoint Form	students fill out the form and disabilities services staff gets notified through email and edit the form submission entity as they work through their work process to handle the request. They use the custom sharepoint view to track and filter requests.	Yes	Yes
Promotional Items Request	https://my.jjc.edu/faculty-staff/marketing/Lists/New%20Promotional%20Items/NewForm.aspx		SharePoint Form	sends notification email and owners use sharepoint view to manage workflow and status	Yes	Yes

Name	URL	Admin URL	What is it?	Description/Connection	Has Workflow	Sends Email
Project Request Form	https://my.jjc.edu/faculty-staff/marketing/Lists/Project%20Request%20form/Newform.aspx		SharePoint Form	sends notification email and owners use sharepoint view to manage workflow and status	Yes	Yes
B&W Work Request	https://my.jjc.edu/faculty-staff/print/Lists/Work%20Request%20%20Black%20and%20White/new.aspx		Customized SharePoint Form	Print services form for employees to request print materials. Emails are sent with links to specific jobs to print services staff	Yes	Yes
Color Work Request	https://my.jjc.edu/faculty-staff/print/Lists/Work%20Request%20%20Color/new.aspx		Customized SharePoint Form	Print services form for employees to request print materials. Emails are sent with links to specific jobs to print services staff	Yes	Yes
Change of final grade form	https://my.jjc.edu/faculty-staff/forms/Pages/Change-of-Final-Grade-Form.aspx		Custom Usercontrol	instructors fill out info, an email is created and emailed to records and reg. The submission is then sent to ImageNow workflow	Yes	Yes
Instructor Initiated Withdrawl Form	https://my.jjc.edu/faculty-staff/forms/Lists/IIWFForm/new.aspx		Customized SharePoint Form	instructor fills out form about a student, the results are the formatted in an email and sent to records where they print to ImageNow and attach to student record	Yes	Yes
iCampus Student Lookup	https://my.jjc.edu/secure/icampus/Pages/default.aspx		Custom Usercontrol	connects to CROA and displays student info	No	No
iCampus Instructor Lookup (may not be used any more)	https://my.jjc.edu/secure/icampus/Pages/instructor-lookup.aspx		Custom Usercontrol	connects to CROA and displays instructor class information	No	No
University Partnerships	https://my.jjc.edu/student/admissions/transfer/Lists/UniversityPartnerships/NewProposal.aspx		Customized SharePoint Form	Stephanie/Jeanette use to organize and approve articulation agreements with other universities. There is a form, view and approval process	Yes	Yes
Directory	https://www.jjc.edu/directory https://my.jjc.edu/faculty-staff/it-security/Lists/exchangeportableconnection/new.aspx		Custom Drupal	Recieves XML from webwiz/Colleague and populates a Drupal view	No	No
Exchange Portable Connection request	https://my.jjc.edu/faculty-staff/it-security/Lists/exchangeportableconnection/new.aspx		Customized SharePoint Form	not sure its used anymore?	Yes	Yes
Confidential and Sensitive Info Form	https://my.jjc.edu/faculty-staff/it-security/Lists/confidentialsensitiveinfo/newform.aspx		SharePoint Form	not sure its used anymore?	No	No
Mobile Computing Agreement	https://my.jjc.edu/faculty-staff/it-security/Pages/default.aspx?/f https://my.jjc.edu/college-resources/early-childhood-center/Pages/observation-request.aspx		SharePoint Form	employees fill this out before being given a mobile device to use	Yes	Yes
ECC Observation Request	https://my.jjc.edu/college-resources/early-childhood-center/Pages/observation-request.aspx	https://my.jjc.edu/forms/ecc/Pages/observation-request-secure.aspx	Custom Usercontrol	Students in the Early Childcare program submit a visitation request as part of thier curriculum	Yes	Yes



**Ellucian Portal:
SharePoint Basics
Participant Guide**

Microsoft SharePoint 2013
January 2014

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Revision History

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About this Guide

Purpose

The purpose of this document is to provide supplemental information and activities to assist you with your familiarity of SharePoint and the Ellucian Portal.

Use

This document should be used as a participant guide and repository for your own thoughts and ideas regarding the implementation and use of the Ellucian Portal at your institution.

Important Notices

Particularly important information is emphasized in the following types of notices.



Activity: Indicates class participation or interaction.



Alert: Indicates cautionary information.



Assessment: Indicates that there is a required assessment to complete.



Best Practices: Indicates best practices or recommended ideas for applying content.



Reference: Indicates additional reference material is available that is not part of the course materials.



Technical Tip: Indicates a technical tip or trick.



Note: Indicates helpful information to perform task.

Course Introduction

Course Objectives

Welcome and thank you for registering for the **Ellucian Portal: SharePoint Basics** course. At the conclusion of this course, you will have the skills and knowledge to:

- Describe the components of the Ellucian Portal, Microsoft SharePoint environments, Colleague by Ellucian (hereafter Colleague), LDAP and their interactions.
- Define key SharePoint functionality and terminology.
- Create and edit sites, pages, and web parts.
- Create SharePoint libraries and lists.
- Manage views and versions.
- Describe additional features.
- Locate SharePoint support resources.

Intended Audience for the Course

This Course is intended for the various members of the Portal Implementation Team involved with the configuration and management of the Portal site. The technical and non-technical staff that make up the Portal Implementation Team include:

- SharePoint administrator
- A team leader
- A technical leader
- Governance team (i.e., Registrar, HR representative, Marketing team representative, Student Services representative, Finance representative)
- IT representative responsible for Help Desk support
- IT representative responsible for development (optional)

How to Maximize Your Learning

We expect you to participate actively throughout the class by asking questions, providing examples, and participating in class discussions. Please do each of the following to make the most of your learning experience:

- Complete the assignments.
- Participate in instructor-led session.
- Share your questions, ideas, challenges, and solutions.



To gain the most from the participant guide, consider printing it in color.

Module 1: Ellucian Portal Overview

The success of any institution often depends on how easy it is for its executives, faculty, staff, and students to access information and resources. But today's colleges and universities often have numerous web-based systems that are managed independently across the institution, making it difficult to locate, access, and exchange important data.

The Ellucian® Portal consolidates all independent web systems into one fully integrated communication and collaboration solution—so everyone can easily find the information they need, without having to navigate multiple networks and systems.

This module will provide you with an overview of the Ellucian Portal to provide context for understanding the powerful foundation SharePoint offers this product.

Module Objectives

At the completion of this module, you will be able to:

- Explain the interaction among the components of the Ellucian Portal, Microsoft SharePoint environments, Colleague, and LDAP.
- List the opportunities the Ellucian Portal offers at your institution.

Ellucian Portal Architecture

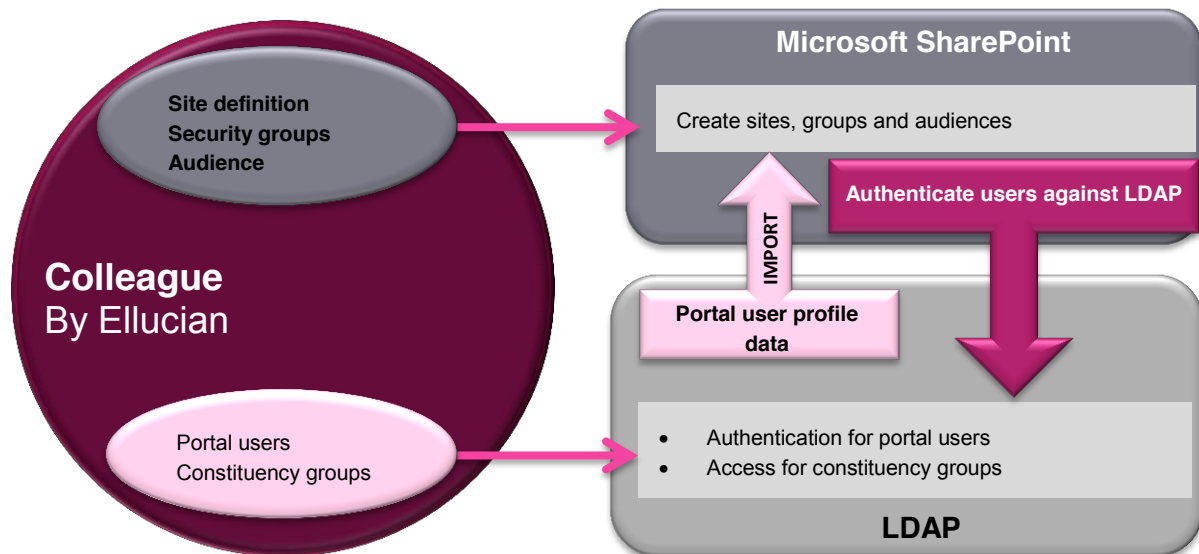
The Ellucian Portal environment is a complex set of interactions among several software components, including:

- Microsoft SharePoint portal, which includes a database layer and web front-end layer.
- Ellucian Colleague or Ellucian Power Campus, which provide the back-end data used by Microsoft SharePoint.
- Lightweight Directory Access Protocol (or LDAP) which provides authentication and access information to Microsoft SharePoint.

Colleague ERP

For most institutions, Colleague is the main repository of data for components of the Ellucian Portal, as shown in the image below.

Ellucian Portal Components (Colleague)



The components of the Ellucian Portal for Colleague and their interactions

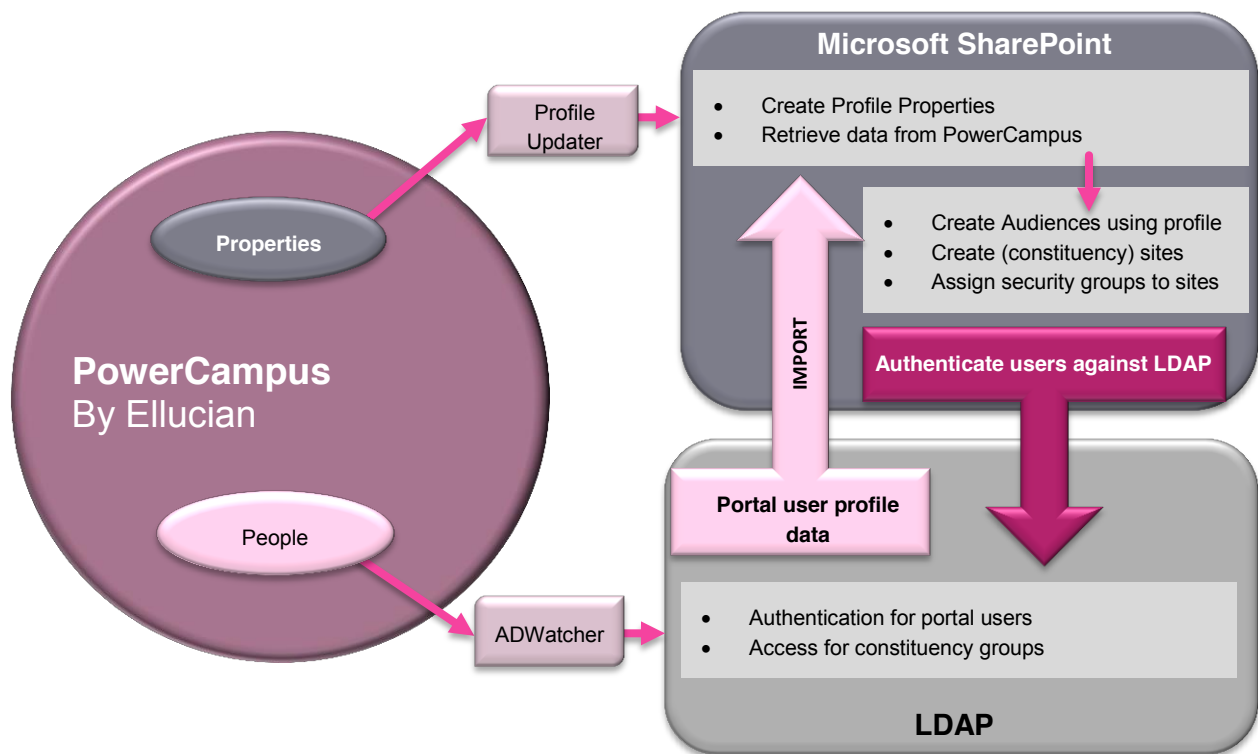
Colleague populates the directory service (via LDAP) with user information and portal constituency group information, which controls the access portal users will have.

Colleague also populates Microsoft SharePoint with information to build and manage site, audience, and user profile information.

PowerCampus ERP

For some institutions, PowerCampus is the ERP for the Ellucian Portal, as shown in the image below.

Ellucian Portal Components (PowerCampus)



The components of the Ellucian Portal for PowerCampus and their interactions

PowerCampus does not integrate directly with the Ellucian Portal. Instead, user accounts are administered using ADWatcher. ADWatcher creates user accounts for new people found in PowerCampus and may be configured to assign users to respective security groups which controls the access portal users will have.

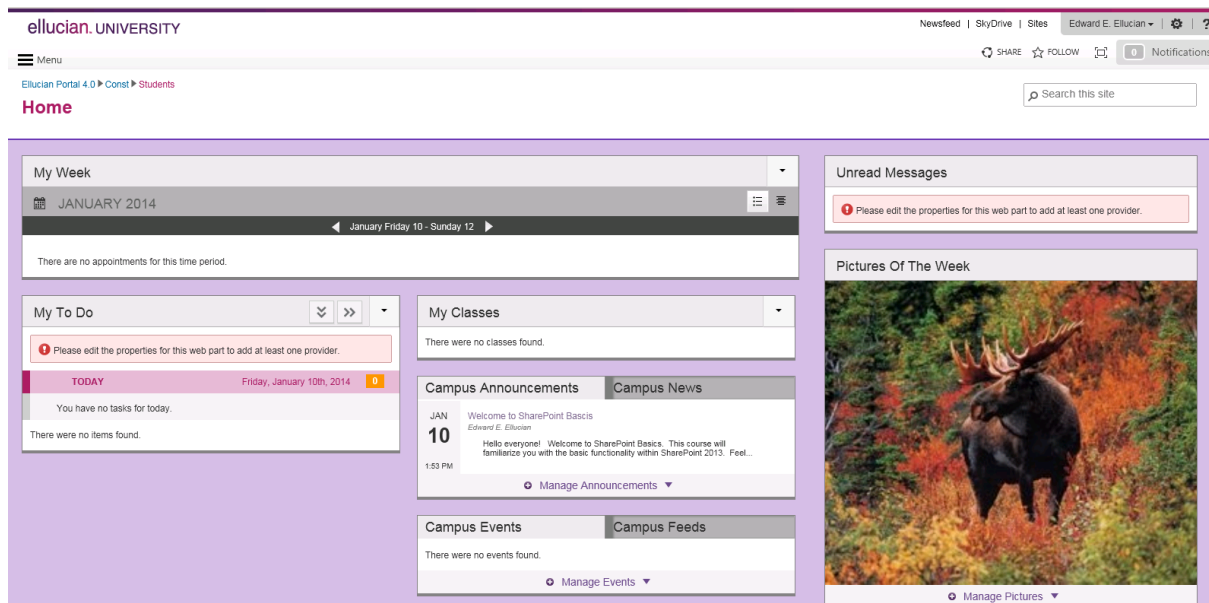
Sites and Audiences are created manually within the Ellucian Portal. Profile Updater is used to maintain and synchronize SharePoint User Profiles.

Ellucian Portal Components

The Ellucian Portal is built on Microsoft SharePoint so it looks like a typical website and 'drives' much like other Microsoft products. Ellucian delivers several components that append to Microsoft SharePoint functionality as well as some new features in Colleague that provide additional integration and configurations for the Ellucian Portal. The most noticeable of these components is through Web Parts, 'containers' used to display information.

In the image below, each content area on the visible page below the banner is a web part.

Sample Portal Site



Web Parts will be discussed in greater detail in later modules, but it is important to know that Microsoft SharePoint comes pre-loaded with a standard list of Web Parts and Ellucian provides additional Web Parts designed specifically to display content designed for a higher education community, such as information pulled from Colleague or PowerCampus.

Additional Notes

Record any notes from the module that you feel are critical in the space below.

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Instructions

1. Think about the potential of the Ellucian Portal and the needs of your institution. What do you want the Portal to do for your institution?

Ellucian Portal | SharePoint Overview

2. Think about your institution's current websites, course catalog, and general Internet presence. What are some of the things that you want to see carry over into your Ellucian Portal?

3. What outstanding questions do you have?



Activity: Access Ellucian Portal Documentation

Locate online resources to familiarize yourself with Ellucian Portal documentation.

Instructions

Complete the tasks below to access Ellucian Portal SharePoint documentation.

Task	Description
1	Log into the Ellucian Support Center (https://ellucian.force.com/clients/sfc/#workspaces).
2	Access the Documentation Libraries page.
3	Locate the Managing the Ellucian Portal (with Colleague or PowerCampus) documentation.
4	Within the document, review the section, Setting Up Individual Web Parts.

What did you find to be helpful or interesting? List your findings below.

Module 2: SharePoint Overview

Microsoft SharePoint is the name attributed to several related Microsoft products. For the purposes of this course, it is the platform system designed to facilitate communication and collaboration around file sharing and web publishing. This module will provide an overview of SharePoint's main features and functionality.

Module Objectives

When you complete this module, you will be able to:

- Describe key SharePoint functionality.
- Identify and define key SharePoint terminology.
- Identify specific instances where SharePoint can benefit a campus community.

SharePoint Features

Key Terminology

To better understand Microsoft SharePoint, it is important to first understand the terminology used to describe the different entities used within SharePoint. Take a moment to review the SharePoint terminology captured in the following table.

Term	Definition	Example
Portal	An access point to information under a unified theme.	<ul style="list-style-type: none">• MSN.com• WebMD.com
Site	A “container” for sub-sites, pages, lists, and libraries.	<ul style="list-style-type: none">• Library Info. Site• ACCT101 Class Site
Page	A place where content and Web Parts are displayed.	<ul style="list-style-type: none">• About Us page• Student Directory page
Library App	A “container” for holding documents and pictures.	<ul style="list-style-type: none">• Shared Documents• Picture Library
List App	A “container” for SharePoint to store data.	<ul style="list-style-type: none">• Announcements• Tasks
Metadata	Data about data.	<ul style="list-style-type: none">• Document owner• Announcement date
My Site	A personal virtual workspace to store and share documents and information; an online replacement for the My Documents folder.	<ul style="list-style-type: none">• Your My Site Home page
Views	Different ways to show the information in a list or library.	<ul style="list-style-type: none">• HR documents• Open tasks
Web Part	A tool used for displaying content on a page.	<ul style="list-style-type: none">• Picture library slideshow• RSS Viewer

Key Features

SharePoint offers many ways for users to communicate, collaborate, and manage content. You can store and share files online, manage lists and links, regulate access to information through permissions, coordinate file updates using workflow, track changes to documents, share pictures, create meeting spaces, manage discussion boards, post events to a shared calendar, and much more.

Some of the noticeable features in SharePoint 2013 include:

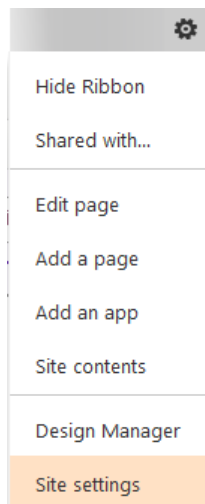
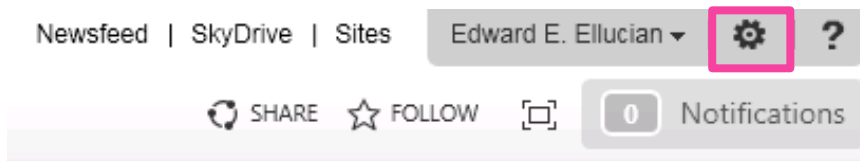
- A Metro Interface that has the look of Windows 8, using tiles.
- Ability to edit and hide the Quick Launch navigation.
- Dynamic Apps such as lists and libraries.
- A SharePoint Store where you can buy and add Apps to a site.
- Drag and drop functionality that allows you to load documents to a library.
- A Robust Task List.
- Easy to use Search capabilities.
- Popularity Trend reports generated directly in Excel.
- A Newsfeed web part on a team site that allows a conversation with other team members directly on the site.
- Utilizes SkyDrive, so that My Site documents are stored in a single library.
- Follow others in SharePoint and view updates in your newsfeed.
- Several social features such as "like" functionality, @mention, hash tags(#), a Community site template with reputation points and badges, and a My Tasks web part that aggregates and displays all of a user's tasks across all sites.
- One Note integration when implementing Office Web Apps.
- Co-authoring capabilities that allow multiple users to check out and edit documents at the same time.

Navigation

There are several ways to execute many of the same actions throughout SharePoint depending on your personal navigational preference. However, Microsoft does provide various areas for collecting your navigational options and contextualizes them so you will have the options you need to manipulate your site when you need them.

Settings

The Setting icon **[Gear]** is used to access editing features for your site.



Focus on Content

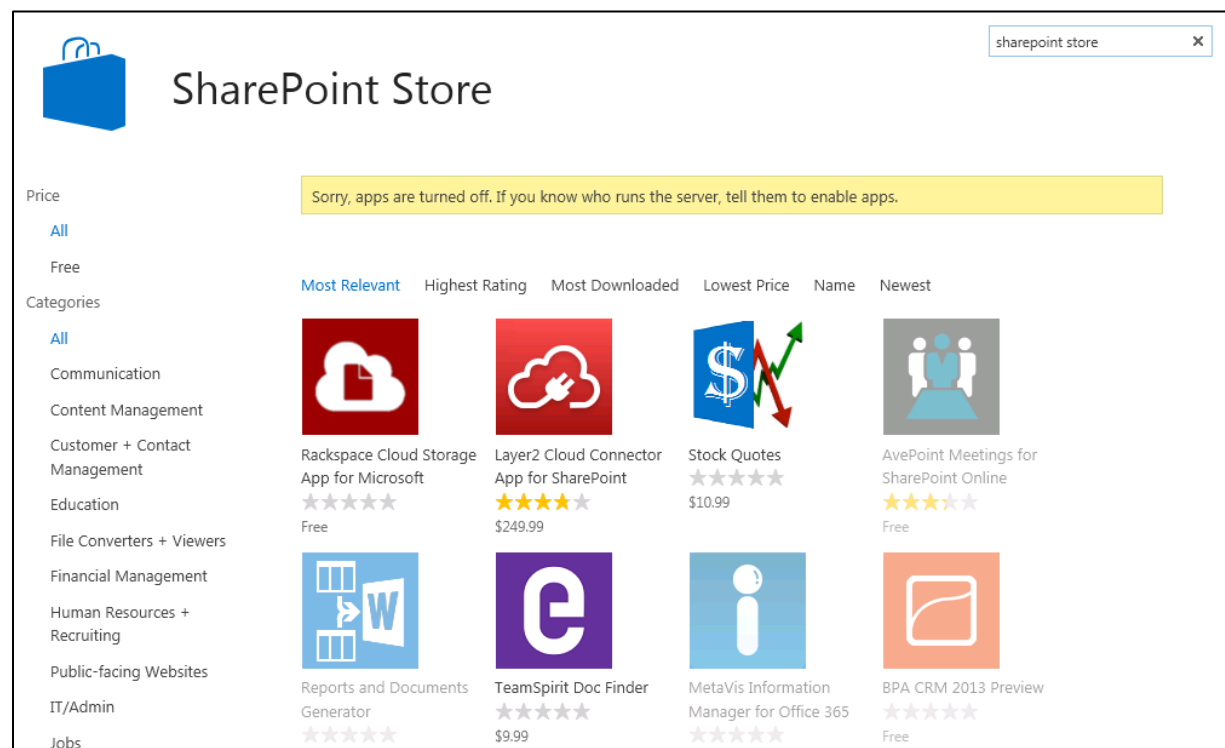
You can hide the Quick Launch (left side) navigation by simply clicking **[Focus on Content]**



Apps Available on the SharePoint Store

When adding an App to your site, you can purchase them from the SharePoint store. Here you can find Apps built by Microsoft and 3rd party developers. When viewing Apps, you can see screen shots and details about the App, as well as reviews of the App. Permission to add an App via the SharePoint store may be controlled by your administrator.

[Settings][Add an App] (On far left navigation)



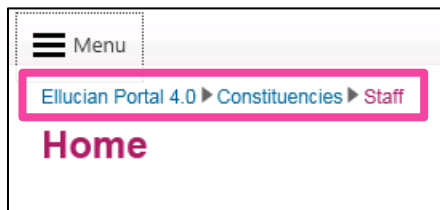
Search

When you click in the search box, you can type your search keyword that will search the default scope.



Breadcrumbs

Use the breadcrumbs to navigate and identify the site you are currently viewing. The breadcrumbs are located beneath your sites navigation bar.



Home Links

To navigate back to your primary constituency you might use:

- Your breadcrumbs
- Your top level navigation
- Your Schools logo in the header

Additional Notes

Record any notes from the module that you feel are critical in the space below.

[illegible]



Activity: Identify SharePoint Entities

Identify the visual representation of the key terminology presented in this module.

Instructions

Identify the number of occurrences for each entity in a site within the Portal.

Indicate the name of the site used here: Faculty

Letter	Entity	How Many Instances Do You See?
A	Page	3
B	Library	3 - Documents, Images, Pages
C	List	6
D	Web Part	16
E	Breadcrumb Trail	1
F	Quick Launch	8

Module 3: Sites and Pages

Sites are “containers” for sub-sites, pages, lists, and libraries. While their purpose will vary, they are instrumental to your ability to share and track information. The way you organize this data is equally important, so SharePoint gives you the option of grouping data onto sub-sites or pages and into libraries or lists.

Module Objectives

At the completion of this module, you will be able to:

- Describe the various types of SharePoint sites.
- Describe SharePoint permissions.
- Create a site.
- Create and edit pages.

SharePoint Sites Overview

Each site is made up of a series of pages where information is displayed. Pages are where content and Web Parts are displayed.

Questions to Consider Before Getting Started

Ask yourself these crucial questions before setting up your site:

- What kind of site will this be?
- Who is its audience?
- What kind of information does your audience care about?
- Who should have access to change the data on the site?
- Who should be allowed to have or create a site or pages on the site?
- What happens to unused sites?
- How will people be trained to use and manage their sites?

Site Types

There are two main types of sites:

- Informational sites display information for visitors to passively view.
- Collaborative sites facilitate interaction among visitors.

Every site can also have a sub-site. A sub-site is a complete site within, or hierarchically below, another site. The benefit of having a sub-site is that it can wholly capture a separate but related topic within the structure of the main site, without creating clutter.

Site Templates

The following table describes the various Microsoft SharePoint and Ellucian templates available for creating Informational and Collaborative sites.

Site's Primary Function	SharePoint Templates	Ellucian Templates	Examples
Informational	Publishing Site	Ellucian Publishing Site	<ul style="list-style-type: none"> Library website School Newspaper Site
		Constituency Site (Student, Faculty, Staff, Executive, Administration, and generic).	<ul style="list-style-type: none"> Faculty Home Page Staff Home Page
Collaborative	Team Site	Department Team Site	<ul style="list-style-type: none"> Payroll Human Resources
		Committee Team Site	<ul style="list-style-type: none"> Faulty Senate Portal Implementation Team
		Class Site	<ul style="list-style-type: none"> Account 101 – 001 Health 244 – 003
		Social Team Site	<ul style="list-style-type: none"> Chess Club A Cappella Choir
		Generic	<ul style="list-style-type: none"> Generic collaborative site



Procedure: Creating a Site

Introduction

Create a SharePoint site using a site template.

Procedure

Follow the steps below to create a SharePoint site.

Task	Description
1	Click Settings located near your name in the upper right hand corner.
2	<p>From the setting menu, select site contents and on the resulting content page, click new subsite.</p> <div> If you do not see the site contents menu or if the option to create a new site does not appear, you may not have permission to create a site.</div>
3	<p>Type a Title, Description, and URL name for the site.</p> <div> Use only letters and numbers, lower case and no spaces for the URL.</div>
4	Select a site template from those provided under Ellucian .
5	Choose any other options you want.
6	Click Create .

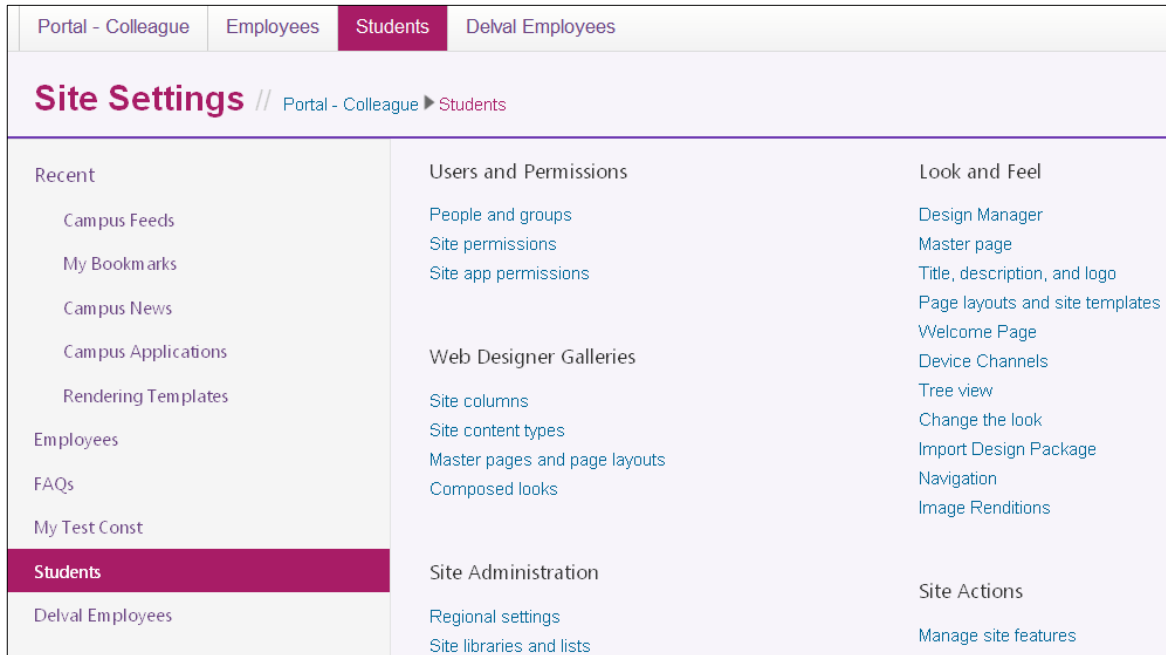
Adding Content to a Site

There are many ways you can add content to a site. The more traditional method is to upload files to a library where it can be linked from other locations throughout your site, typing content into a list or typing content directly onto the site.

You must have the proper permissions to contribute this way. Only people who have the correct permissions can view or access the information you add. If the content you add requires approval, it may be uploaded or posted, but not actually visible until it is approved, depending on how your site's workflow is set up. This topic will be addressed further when we address Pages.

Site Settings

Your site's settings can be manipulated by choosing a site, clicking on Settings (Gear icon) and then the Site settings menu option. The image below displays some of the features a typical user can manipulate from the Site Settings page.



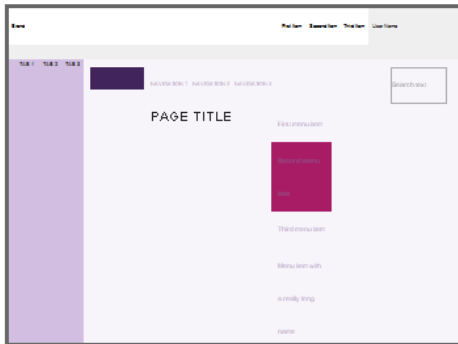
A few items of particular interest include:

- Users and Permissions
 - People and groups – This is where you add users to your site.
- Look and Feel
 - Title, description, and logo – This is where you change the title and/or description of your site.
 - Change the look – This is where you select, preview, and apply a pre-installed look.
 - Navigation – This is where you change the order and appearance of items on the site's Quick Launch navigation bar.
- Site Actions
 - Delete this site – This is where you delete your site.

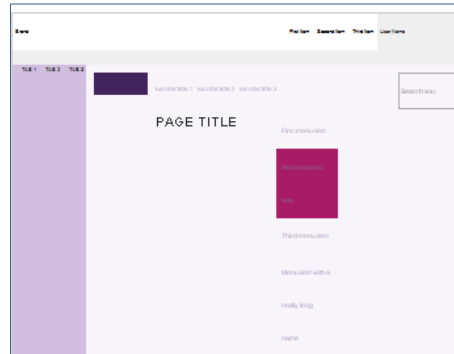
There is a lot more to you can do from the Site Settings menu, especially if you are the site's administrator, so take some time to investigate your options.

Site Look

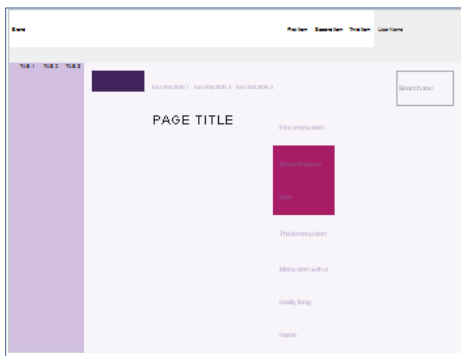
SharePoint allows you to change the look of a site whenever you like. You can select from a variety of pre-installed looks as depicted in the image below or you can import a complete design package. Pre-installed looks include one by Ellucian as well as several by SharePoint (Grey, Orange, Breeze, Nature, etc.).



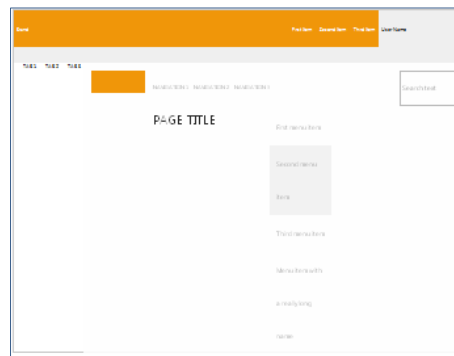
Current



Ellucian



Sample Colors



Orange


Procedure: Changing Site Looks

Introduction

Change a SharePoint site with a pre-installed SharePoint or Ellucian look.

Procedure

Follow the steps below to change the site look on a SharePoint site.

Task	Description
1	Click Settings located near your name in the upper right hand corner.
2	<div>From the setting menu, select site settings.</div> <div> If you do not see the site settings menu or the appropriate links under Look and Feel, you may not have permission to modify the look of a site.</div>
3	Click on Change the Look under Look and Feel.
4	Select a look from the list of pre-installed choices. Note the colors that will be applied for the six accent colors.
5	Click Try it out to temporarily preview your selected theme choice.
6	If you like what you see, click Yes, keep it . Otherwise, click No, not quite there .

SharePoint Pages Overview

Each site is made up of a series of pages where information is displayed. Pages are where content and Web Parts are displayed.

Procedure: Creating Pages

Introduction



Create pages for a SharePoint site using the Add a Page option.



The steps for creating a page may vary depending on the type of site you are on, whether publishing features are enabled, and whether approval is required to publish pages.

Procedure

Follow the steps below to create a new page on a SharePoint site.

Task	Description
1	Click Settings located near your name in the upper right hand corner.
2	Click Add a Page.  If you do not see the Add a Page menu button or if the option to create a new page does not appear, you may not have permission to create a page.
3	Type a name for the page.
4	Click Create .
5	Do one or more of the following on the new page you created: <ul style="list-style-type: none">• To add text, type or copy text into the text box.• To format your text, click the Format Text tab on the ribbon.• To insert a Web Part or an existing list, click the Insert tab, click the appropriate button, select the Web Part or list you want, and click Add.• To modify the layout of the page, click on the Page tab, click on the Page Layout button and select the layout you want.
6	Click Save on the ribbon when you are finished editing the page.  The page is currently checked out to you and only you can see your changes until it is checked in and then published.



Procedure: Editing Pages

Introduction

After you have created a page, you can edit many elements on the page within SharePoint.

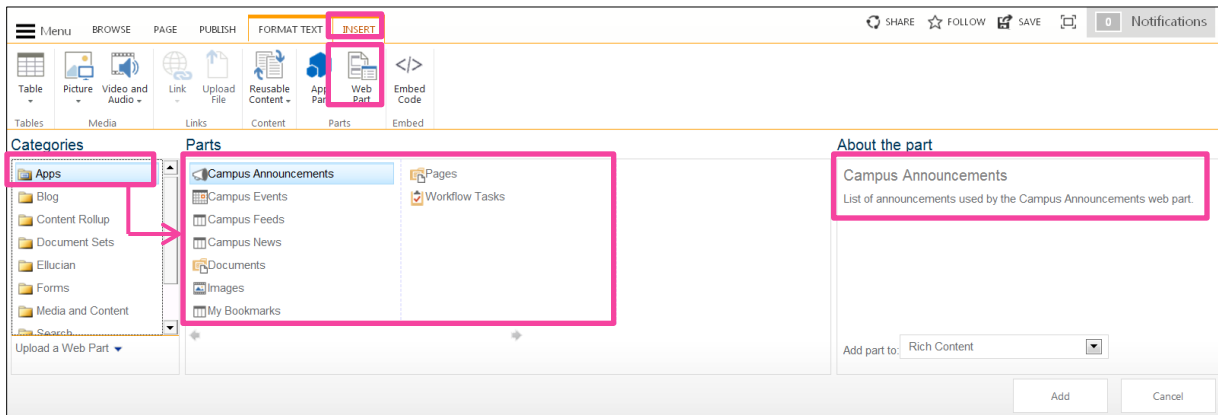
Procedure

Follow the steps below to edit a page on a SharePoint site.

Task	Description
1	Click Settings located near your name in the upper right hand corner.
2	Click Edit Page.  If you do not see the Edit Page menu button or if the option to create a new page does not appear, you may not have permission to create a page.
4	Do one or more of the following on the new page you created: <ul style="list-style-type: none">• To add text, type or copy text into the text box.• To format your text, click the Format Text tab on the ribbon and select a button.• To insert a Web Part, click the Add a Web Part link in the appropriate zone, select the Web Part or list you want, and then click Add.• To modify the layout of the page, click on the Page tab, click on the Page Layout button and select the layout you want.
5	Click Save on the ribbon when you are finished editing the page.  The page is currently checked out to you and only you can see your changes until it is checked in and then published.

Web Parts

Microsoft SharePoint comes with a number of Web Parts built to help you display information more easily throughout your site. The Web Parts you have depend on your version of Microsoft SharePoint. These Web Parts are grouped together by category, as displayed in the image below.



Web Part Categories

A few examples of key Web Parts and their descriptions are captured in the following table.

Category	Web Part	Description
Apps	Campus Announcements	List of announcements used by the Campus Announcements web part.
	Campus Events	List of events used by the Campus Events web part.
	Campus Feeds	List of syndication feeds used by the Campus Feeds web part.
	Campus News	List of news items used by the Campus News web part.
	My Bookmarks	List of bookmarks used by the My Bookmarks web part.
Content Rollup	Content Query	Displays a dynamic view of content from your site.
	Relevant Documents	Displays documents that are relevant to the current user.
	Summary Links	Allows authors to create links that can be grouped and styled.
	Table of Contents	Displays the navigation hierarchy of your site.
	Timeline	Displays a high level view of data from another webpart or tasks list.
Media and Content	Content Editor	Allows authors to enter rich text content.
	Image Viewer	Displays a specified image.
	Page Viewer	Displays another web page on this web page in an IFrame.
	Picture Library Slideshow	Displays a slideshow of images and photos from a picture library.
Social Collaboration	Site Users	Displays a list of the site users and their online status.
	User Tasks	Displays tasks that are assigned to the current user.

For more information and descriptions of the various Web Parts available in SharePoint, go to <http://sharepoint.microsoft.com>.



Procedure: Adding a Web Part to a Page

Introduction

After you have created a page, you can add web parts to a page within SharePoint.

Procedure

Follow the steps below to add a Web Part to a SharePoint page.

Task	Description
1	Click the Page tab in the ribbon from any page.
2	Click Edit .  If the Edit command is disabled, you may not have the permissions to edit the page. Contact your administrator.
3	Click the Insert sub-ribbon tab, and then click Web Part .
4	Select a category under Categories, such as Ellucian or Search.
5	Select the Web Part that you want to add to the page, such as Campus Announcements, and then click Add .  When you select a Web Part, information about the Web Part is displayed in About the part.
6	Click the Page tab when you have finished editing the page.
7	Click Save on the ribbon when you are finished editing the page.



Procedure: Moving a Web Part on a Page

Introduction

Move Web Parts to different areas of a SharePoint page.

Procedure

Follow the steps below to move a Web Part on a SharePoint page.

Task	Description
1	Click the Page tab in the ribbon from any page.
2	Click Edit .  If the Edit command is disabled, you may not have the permissions to edit the page. Contact your administrator.
3	In the upper right-hand corner of the Web Part you wish to move, select the down arrow and then Edit Web Part.
4	In the resulting property pane, expand the Layout grouping and modify the Zone property.  If your permissions allow, it is also possible to select the Web Part and drag it to a desired location on the page.
5	Click the Page tab.
6	Click Save on the ribbon when you are finished editing the page.


Procedure: Minimizing or Restoring a Web Part on a Page

Introduction

If a page seems crowded, you may want to configure a Web Part to be minimized by default. Readers of the page can always restore the Web Part while they are reading the page, but it will default to Closed every time the page is opened or refreshed.

Procedure

Follow the steps below to minimize and restore a Web Part on a SharePoint page.

Task	Description
1	Click the Page tab in the ribbon from any page.
2	Click Edit .
3	Point to the Web Part you want to minimize.
4	Click the down arrow on the upper-right hand corner of the Web Part.
5	Click Minimize.  The Restore option is only available once a Web Part has been minimized. To Restore, follow Steps 1-4 and then select Restore (instead of Minimize).
6	Click the Page tab.
7	Click Save on the ribbon when you are finished editing the page.

Procedure: Deleting a Web Part from a Page

Introduction

If you want to eliminate a Web Part from a page, you can delete it.



This procedure does not delete the Web Part from the site. It only deletes it from the page.

Procedure

Follow the steps below to delete a Web Part from a SharePoint page.

Task	Description
1	Click the Page tab in the ribbon from any page.
2	Click Edit .
3	Point to the Web Part you want to remove from the page.
4	Click the down arrow on the upper-right hand corner of the Web Part.
5	Click Delete .
6	Click OK in the confirmation window.
7	Click the Page tab.
8	Click Save on the ribbon when you are finished editing the page.

Managing SharePoint Permissions

There are several standard levels of permissions in SharePoint designed to help regulate who can see, and more importantly edit or delete, specific content. By default, permissions will be inherited down through sub-sites and pages. Sometimes the permissions on a site narrow as the content drills down into deeper detail and focuses on a more specific audience.

A site owner or administrator can grant permission levels to users and to SharePoint groups, which contain users. The permissions can be applied to a site, the lists and libraries on a site, and the items in the lists and libraries.

The following table describes the six standard SharePoint permission levels.

Permission level	Description	Permissions included by default
Limited Access	Allows access to shared resources in the website so that the users can access an item within the site. Designed to be combined with fine-grained permissions to give users access to a specific list, document library, item, or document, without giving them access to the entire site. Cannot be customized or deleted.	<ul style="list-style-type: none">• Browse User Information• Use Client Integration Features Open
Read	Allows read-only access to the website.	<ul style="list-style-type: none">• View Items• Open Items• View Versions• Create Alerts• View Application Pages• Use Self-Service Site Creation• View Pages• Browse User Information• Use Remote Interfaces• Use Client Integration Features• Open
Contribute	Create and edit items in the existing lists and document libraries.	<ul style="list-style-type: none">• Read permissions• Manage Unsafe Content

Permission level	Description	Permissions included by default
Design	Create lists and document libraries and edit pages in the website.	<ul style="list-style-type: none"> • Approve permissions • Manage Lists • Add and Customize Pages • Apply Themes and Borders • Apply Style Sheets
Full Control	Allows full control of the scope.	permissions

Additional Notes

Record any notes from the module that you feel are critical in the space below.

This image shows a full page of blank white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page, providing a template for writing or drawing. There are no margins, text, or other markings present.



Activity: Site Types

Identify the difference between Informational and Collaborative sites.

Instructions

1. Circle I, for Informational, or C, for Collaborative, to indicate which kind of sites are being described in the following quotations heard around campus.
2. Identify the Ellucian Template most likely being used.

1. The site we're creating will filter information to our entire faculty, not just those in the Education Department.

I or C Template: _____

2. I go to this site to find all the information pertaining to my Social Media class.

I or C Template: _____

3. Our sorority made some t-shirts for the event that you can buy on our site.

I or C Template: _____

4. You can check out this week's menu on the Dining Hall site.

I or C Template: _____



Activity: Match Permissions

Practice assigning the appropriate permissions to typical SharePoint users.

Instructions

Imagine your department is creating a collaborative team site. You want the content on this site to collect the work and ideas of your staff. You also want them to formally managing the content being published to keep it current.

Using the following lists, match the permissions to the typical SharePoint user role. More than one role may apply to the permissions listed below.

Permissions	Typical User
a. Full Control	1. Sally Smith, Student Worker
b. Contribute	2. David Brown, Department Vice President
c. Design	3. Sonny Adams, Site Administrator
d. Read	4. Margaret Greer, Manager
	5. Frieda Marks, Faculty Representative
	6. Site Visitors



Activity: Create a Site

Practice creating a SharePoint site using the steps presented in this course.

This activity should take no more than 20 minutes to complete.



This activity is required because it sets the foundation for other activities in subsequent modules.

Instructions

1. Create a site using the SharePoint Team Site template.
2. Update the Site Properties and Look and Feel as you prefer.



Activity: Add Web Parts

Practice adding Web Parts to a SharePoint site using the steps presented in the course.

This activity should take no more than 20 minutes to complete.



This activity is required because it sets the foundation for other activities in subsequent modules.

Instructions

1. Using the participant guide and your notes, navigate to the site you created previously.
2. Add a Picture Library Slideshow Web Part. (You will add the pictures displayed in this web part later in the course.)
3. Add a Summary Link Web Part and add at least three links.



This activity is required because it sets the foundation for other activities in subsequent modules.

Module 4: Libraries and Lists

The heart of your SharePoint site is its lists and libraries. These 'containers' make much of the information you post and upload to your site, accessible and manageable.

Module Objectives

At the completion of this module, you will be able to:

- Define the various types of libraries that can be created in SharePoint and their uses.
- Define the various types of lists that can be created in SharePoint and their uses.
- Explain how custom lists can be created and used.
- Explain how custom columns can be created and used.

SharePoint Libraries Overview

Libraries

A library is more than a container for holding documents and pictures. It's an organizational tool that helps you collect, update, and manage files. Libraries display key information about files so you can edit and manage their properties without opening them. Files are uploaded through your browser. Anyone with the proper permissions can view or edit them.

The Document Library is a popular built-in app, that is created automatically when you create many types of sites. Use a document library to store, organize, sync, and share documents with people. You can create more libraries, such as a picture library for storing images, if you have permission to manage lists.


Procedure: Creating a Document Library

Introduction

Create a document library application for a SharePoint site using the Add an App feature.

Procedure

Follow the steps below to create a SharePoint document library app.

Task	Description
1	Click Settings located near your name in the upper right hand corner.
2	From the settings menu, select site contents and on the resulting content page, click add an app .  If you do not see the site contents menu or if the option to add an app does not appear, you may not have permission to add an app.
3	In the Apps you can add section click Document Library . Alternatively, you can click on App Details first to see more information about the app and then click on the Add It button.
3	Type a Name for the library.
4	Click on the Advanced Options link and provide a description.
5	Click Create .


Procedure: Creating a Different Kind of Library

Introduction

You can create a variety of library applications for a SharePoint site such as a picture library or asset library.

Procedure

Follow the steps below to create a library app of SharePoint library.

Task	Description
1	Click Settings located near your name in the upper right hand corner.
2	<p>From the settings menu, select site contents and on the resulting content page, click add an app.</p> <div> If you do not see the site contents menu or if the option to add an app does not appear, you may not have permission to add an app.</div>
3	In the Apps you can add section , click Picture Library or Asset Library . Alternatively, you can click on App Details first to see more information about the app and then click on the Add It button.
3	Type a Name for the library.
4	Click on the Advanced Options link and provide a description.
5	Click Create .

Procedure: Adding a File to a Library

Introduction

Once your library is created, you can add a file to the library.

Procedure

Follow the steps below to add a file to a SharePoint library.

Task	Description
1	Click the new document link in the library where you want to add the file OR click on the Files tab on the ribbon in the library where you want to add the file.
2	Click Upload Document.
3	Browse to the document.
4	Click OK .



You can also upload documents to a document library simply by moving them into the library using your mouse (click and drag).

Procedure: Editing or Deleting a File in a Library

Introduction

Edit or delete files that are located in a SharePoint library application.

Procedure

Follow the steps below to edit a file in a SharePoint library.

Task	Description
1	Point to a file.
2	Select the check box that appears next to the file.
3	Click either Edit Document or Delete Document on the Files tab on the ribbon, as appropriate.



You can also delete documents from a library simply pressing the delete key on your keyboard.

Procedure: Adding a Column to a Library

Introduction

You can add a column to a SharePoint library to organize and categorize the files in your library. You can also use the columns in a list or library to create views to help specific departments find the information that they are most interested in, such as tasks with the highest priority or all items assigned to each person. Views will be discussed in more detail in Module 5.

Procedure

Follow the steps below to add a column to an established SharePoint library.

Task	Description
1	Navigate to a library on your site.
2	On the Library tab, click on the Library Settings button.
3	Click Create Column.
4	Type a name for the new column in the Name and Type section.
5	Choose the type of column being added from the list provided in the Name and Type section.
6	Choose any additional settings to define how the new column will work in the Additional Column Settings section.
7	Click OK .

SharePoint Lists Overview

Most content in SharePoint is stored in a list. But how you organize your lists and libraries depends on the needs of your group and on how you prefer to store and search for your information.

Lists

A list is a container for storing data in SharePoint. Examples include:

- Announcements
- Calendars
- Links
- Tasks
- Custom lists
- Custom columns
- Surveys

Although there are different types of lists, the procedure for adding items to them is similar, so you do not have to learn several new techniques to work with them. A list item contains text in a series of columns, but some lists may allow attachments to be added to the item.

Some features of lists can help your team create and manage items efficiently across several lists or libraries. For example, you can create a column that provides information about list items and then share it across other lists. Or, if you want to make a file available in multiple libraries, you can easily copy it to other libraries on your site. You can be prompted for updates if the file has changed.


Procedure: Creating a List

Introduction

Create a list to organize data within SharePoint site.

Procedure

Follow the steps below to create a SharePoint list.

Task	Description
1	Click Settings located near your name in the upper right hand corner.
2	From the settings menu, select site contents and on the resulting content page, click add an app .  If you do not see the site contents menu or if the option to add an app does not appear, you may not have permission to add an app.
3	In the Apps you can add section, click the type of list you want to create in the site. For example, Calendar.
4	Type a Name for the list.
5	Click on the Advanced Options link and provide a description.
6	Click Create .


Procedure: Adding Items to a List

Introduction

Add a variety of items to a SharePoint list.

Procedure

Follow the steps below to add items to a SharePoint list.

Task	Description
1	Locate the list where you want to add the item.
2	Click the Items tab on the ribbon. Example: Events for a calendar.
3	Click New Item Example: New Event for a calendar.  Another quick way to add an event to a calendar is to point to a date on the calendar, and then click Add .
4	Complete the required fields and any others that you want to complete.
5	Click Save .


Procedure: Editing and Deleting Items in a List

Introduction

Edit or delete any items displayed in a SharePoint list.

Procedure

Follow the steps below to edit and delete SharePoint list items.

Task	Description
1	<p>Point to an item and then select the check box that appears next to the item.</p> <div> You can perform actions on multiple items by selecting multiple check boxes.</div>
2	<p>On the Files tab on the ribbon, click either Edit Item or Delete Item, as appropriate.</p>



On many types of sites, some lists are created for you, as with a discussion board or a calendar. If you have permission, you can also create lists from several types of list templates, which provide structure and settings to give you a head start.

Additional Notes

Record any notes from the module that you feel are critical in the space below.

[illegible]



Activity: Libraries and Lists Review

Test your memory and understanding of lists and libraries.

Instructions

1. Read the questions below.
2. Indicate the best answer in the space provided.

Questions

1. _____ SharePoint content:
 - a. is only displayed in lists.
 - b. can only be displayed in libraries.
 - c. can be displayed in lists or libraries or even Web Parts.
 - d. is hard to navigate.
2. _____ The benefit of using libraries is:
 - a. that files can be stored in a single location.
 - b. that files can be linked to numerous other locations.
 - c. that users can capture metadata and store version history for each of these files.
 - d. All of the above.
3. _____ When adding a new column to a library or list, the Column Type that allows users to choose from a list of responses you specify is:
 - a. Multiple Lines of Text.
 - b. Choice.
 - c. Number.
 - d. Additional Columns.



Activity: Create a Library

Practice creating SharePoint libraries using the steps presented in this course.


This activity should take no more than 30 minutes to complete.



This activity is required because it sets the foundation for other activities in subsequent modules.

Instructions

Follow the steps below to create a Library.

Task	Description
1	Locate three images and save them to your desktop.
2	Using the participant guide and your notes, access the training environment and navigate to the site you created in a previous activity.
3	Create a Picture Library and upload at least three pictures to it.
4	Add a column called 'Favorite Order' and populate it with numbers to indicate your preference (for example, 1- Favorite, 2 – Next favorite, 3 – Least favorite).  This participant guide presents the basic steps to perform this activity.
5	Create a Document Library.
6	Add a custom column for simple descriptions that lets users explain what the document is when they post it. The column type should be multi-line text.
7	Add another custom column to capture which Portal service area the document pertains to. The column type should be Choice and your options should include the following: Branding Colleague PowerCampus Communications Governance Taxonomy SharePoint Training



Activity: Create a List

Practice creating SharePoint lists using the steps presented in this course.

This activity should take no more than 30 minutes to complete.



This activity is required because it sets the foundation for other activities in subsequent modules.

Instructions

Follow the steps below to create a list.

Task	Description
1	Using the participant guide and your notes, access the training environment and navigate to the site you created in a previous activity.
2	Create an Announcements list with at least two announcement entries.
3	Create a Campus News list with at least two articles.
4	Create a Calendar list and add at least two meetings or events to it.



This participant guide presents the basic steps to perform this activity.

Module 5: Views and Version Control

SharePoint provides multiple ways you can change how you view your site's content, from sorting, to filters, to changing and creating your own customized views. This method is an excellent way to narrow your focus to specific types of data and make changes without having to sift through long lists or full libraries.

Module Objectives

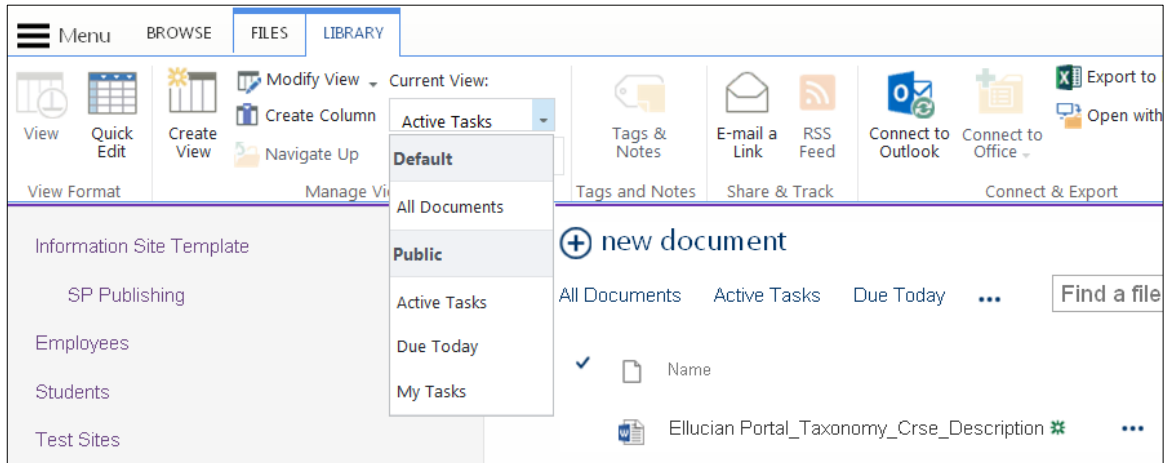
At the completion of this module, you will be able to:

- Sort and filter lists.
- Create a new view.
- Create and restore previous versions of documents.
- List considerations for managing versions.

SharePoint Views Overview

Views

A SharePoint view is, literally, the presentation of content for a user to see in a list or library. In SharePoint, your view of how content is displayed can be changed, including setting up different views for different user groups.



Current Views Drop Down Menu Highlighted

Procedure: Changing the View of a List or Library

Introduction

Change a delivered or custom view of a list or library from a drop-down menu.

Procedure

Follow the steps below to change the view of a SharePoint library or list.

Task	Description
1	Locate the library or list you want to change.
2	Click the Library or List ribbon sub-tab.
3	Click the arrow next to the Views list in the Manage Views group, under Current View.
4	Pick the view you wish to display by clicking on its name.

Procedure: Changing the Current View by Sorting

Introduction

Change the current view of a SharePoint list or library by using the sort function. .

Procedure

Follow the steps below to change the Current view of a SharePoint library or list by sorting.

Task	Description
1	Locate the library or list you want to change.
2	Click the column once to sort in ascending order (assuming you have more than one item in the list or library) or twice to sort in descending order.


Procedure: Changing the Current View by Filtering

Introduction

Change the current view of a SharePoint list or library by using the filtering function.

Procedure

Follow the steps below to change the current view of a SharePoint library or list by filtering.

Task	Description
1	Locate the library or list you want to change.
2	Hover over the column in your list or library that you want to filter by.
3	Click the drop-down arrow.
4	<div><div></div><div>You cannot filter using the displayed values if you have not first added files or items that contain different values to base the filter on.</div></div> <div>Choose a value for filtering.</div>

Options for Creating New Views

SharePoint provides several standard view formats on which you can base a new view configuration of your own creation:

- The Standard view displays files or listed content like a traditional list on a web page. This is the default view for most types of lists and libraries in SharePoint.
- The Calendar view displays your calendar items in the same format as a desk or wall calendar so you can see your activities in daily, weekly, or monthly snapshots.
- The Access view creates forms and reports in Microsoft Access based on this list.
- The Datasheet view displays your data into an editable spreadsheet that is convenient for bulk editing and quick customization.
- The Gantt view lists your content in a Gantt chart for a graphical representation of how a team's tasks relate to each other over time.
- A Custom View uses SharePoint Designer to create a new view for the list with capabilities such as conditional formatting.

For more information on all of these views, contact your Ellucian Consultant.


Procedure: Creating New Views

Introduction

You can create a new personal or public view of a SharePoint list or library.

Procedure

Follow the steps below to create a view in SharePoint.

Task	Description
1	Open the Documents library created previously on your site.
2	Click on the Call Out menu button (...) at the top of the library and select Create View .
3	Choose the Standard View format.  You may choose the check box that says “Make this the Default view (Applies to public views only)” if you want to see this view each time you open the library.
4	Give your view a name in the View Name field.
5	Choose the radio button that corresponds with the intended audience for this view: Personal or Public.
6	Choose the check box next to the columns you wish to include in your view and order from the left.

Task	Description																				
7	<p>Choose the appropriate view options from the list provided that meet your needs.</p> <table> <tr> <th>View Option</th><th>Description</th></tr> <tr> <td>Sort</td><td>Select up to two columns to determine the order in which the items in the view are displayed.</td></tr> <tr> <td>Filter</td><td>Show all of the items in this view, or display a subset of the items by using filters. To filter on a column, based on the current date or the current user of the site, type [Today] or [Me] as the column value. Use indexed columns in the first clause in order to speed up your view. Filters are particularly important for lists containing 5,000 or more items because they allow you to work with large lists more efficiently.</td></tr> <tr> <td>Tabular View</td><td>Choose whether individual check boxes for each row should be provided. These check boxes allow users to select multiple list items to perform bulk operations.</td></tr> <tr> <td>Group By</td><td>Select up to two columns to determine what type of group and subgroup the items in the view will be displayed in.</td></tr> <tr> <td>Totals</td><td>Select one or more totals to display.</td></tr> <tr> <td>Style</td><td>Choose a style for this view (Basic Table, Document Details, Newsletter, Newsletter (no lines), Shaded, Preview Pane, or Default).</td></tr> <tr> <td>Folders</td><td>Specify whether to navigate through folders to view items, or to view all items at once.</td></tr> <tr> <td>Item Limit</td><td>Use an item limit to limit the amount of data that is returned to users of this view. You can either make this an absolute limit, or allow users to view all the items in the document library in batches of the specified size.</td></tr> <tr> <td>Mobile</td><td>Adjust mobile settings for this view.</td></tr> </table>	View Option	Description	Sort	Select up to two columns to determine the order in which the items in the view are displayed.	Filter	Show all of the items in this view, or display a subset of the items by using filters. To filter on a column, based on the current date or the current user of the site, type [Today] or [Me] as the column value. Use indexed columns in the first clause in order to speed up your view. Filters are particularly important for lists containing 5,000 or more items because they allow you to work with large lists more efficiently.	Tabular View	Choose whether individual check boxes for each row should be provided. These check boxes allow users to select multiple list items to perform bulk operations.	Group By	Select up to two columns to determine what type of group and subgroup the items in the view will be displayed in.	Totals	Select one or more totals to display.	Style	Choose a style for this view (Basic Table, Document Details, Newsletter, Newsletter (no lines), Shaded, Preview Pane, or Default).	Folders	Specify whether to navigate through folders to view items, or to view all items at once.	Item Limit	Use an item limit to limit the amount of data that is returned to users of this view. You can either make this an absolute limit, or allow users to view all the items in the document library in batches of the specified size.	Mobile	Adjust mobile settings for this view.
View Option	Description																				
Sort	Select up to two columns to determine the order in which the items in the view are displayed.																				
Filter	Show all of the items in this view, or display a subset of the items by using filters. To filter on a column, based on the current date or the current user of the site, type [Today] or [Me] as the column value. Use indexed columns in the first clause in order to speed up your view. Filters are particularly important for lists containing 5,000 or more items because they allow you to work with large lists more efficiently.																				
Tabular View	Choose whether individual check boxes for each row should be provided. These check boxes allow users to select multiple list items to perform bulk operations.																				
Group By	Select up to two columns to determine what type of group and subgroup the items in the view will be displayed in.																				
Totals	Select one or more totals to display.																				
Style	Choose a style for this view (Basic Table, Document Details, Newsletter, Newsletter (no lines), Shaded, Preview Pane, or Default).																				
Folders	Specify whether to navigate through folders to view items, or to view all items at once.																				
Item Limit	Use an item limit to limit the amount of data that is returned to users of this view. You can either make this an absolute limit, or allow users to view all the items in the document library in batches of the specified size.																				
Mobile	Adjust mobile settings for this view.																				
8	Click OK .																				

SharePoint Versioning Overview

SharePoint provides multiple ways you can keep track of how the content on your site is changing. Versioning is an excellent way to know what's going on without having to verify the information on each library, list, file, and page that is open for editing by others.

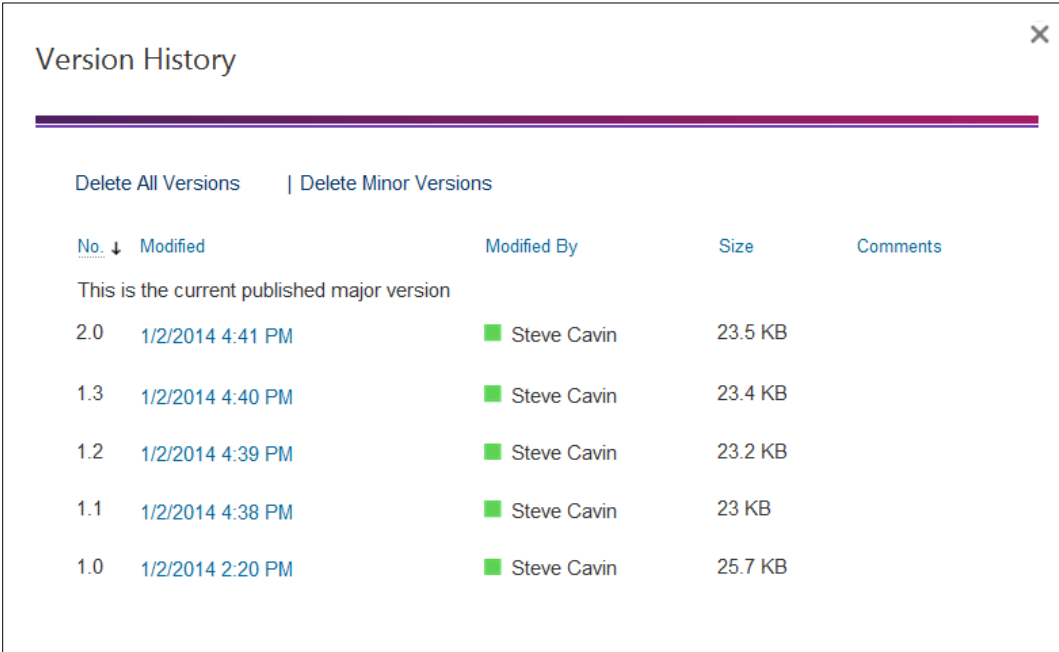
Version Control

In SharePoint, you can exercise a series of methods to manage changes to content, known as version control or versioning. These methods include:

- Automatically store historical versions of documents each time a document is edited and saved.
- Set up Alerts that send email notifications every time a file, library, or list is updated.
- Restore or delete previous versions of documents negating more recent edits.

Version History

The image below depicts a document's version history. Numbers on the left-hand side indicate the different version numbers. The first version started as a draft and was given the first version history number available, 1.0. One of the 1.x versions is created when properties or metadata of the document change. The most current version is the published major version, indicated by a new whole number.



The screenshot shows a 'Version History' dialog box with a close button (X) in the top right corner. Below the title bar, there are two links: 'Delete All Versions' and 'Delete Minor Versions'. A table follows with columns: 'No.' (with a dropdown arrow), 'Modified', 'Modified By', 'Size', and 'Comments'. A note states 'This is the current published major version' pointing to version 2.0. The table lists five versions, all created by 'Steve Cavin' on 1/2/2014.

No. ↓	Modified	Modified By	Size	Comments
This is the current published major version				
2.0	1/2/2014 4:41 PM	Steve Cavin	23.5 KB	
1.3	1/2/2014 4:40 PM	Steve Cavin	23.4 KB	
1.2	1/2/2014 4:39 PM	Steve Cavin	23.2 KB	
1.1	1/2/2014 4:38 PM	Steve Cavin	23 KB	
1.0	1/2/2014 2:20 PM	Steve Cavin	25.7 KB	

A sample Version History page

Procedure: Changing Versioning Settings

Introduction

You can change the way you track versions of a document under Version Settings in SharePoint.

Procedure

Follow the steps below to change the settings for versions in a library or list in SharePoint.

Task	Description
1	Open a library or list on your site.
2	Click on the Library sub-ribbon.
3	Click on Library Settings.
4	Click on Versioning Settings.
5	Choose Create Major Versions in the <i>Document Version History</i> section.
6	Choose Yes in the <i>Require Check Out</i> section.
7	Click OK .

Co-Authoring Documents

Versioning is especially helpful when several people work together on projects or when information goes through several stages of development and review.

In SharePoint, two or more users can edit a Word document or PowerPoint presentation at the same time. This feature lets you read and write portions of a file stored in SharePoint while someone else does the same. The edits are then merged as the file is saved back into the library or list. For example, you can work on one paragraph in a Word document while a colleague works on another paragraph in the same document at the same time.

Check Out/Check In

Another method of tracking document revisions is to institute check out/check in procedures. This optional feature forces anyone with access to the file to 'claim' it before editing it. This action prevents other users from editing the file on SharePoint while you are working on the file. Note they can still open a read-only version of the file. Checking out/Checking in notifies others that the file is being updated.

Procedure: Checking Out Files

Introduction

You can check out files from a document library to manage who edits the document when multiple people have access to the document.

Procedure

Follow the steps below to check out a SharePoint file.

Task	Description
1	Locate the document that you want to check out.
2	Click on the Call Out menu button (...) to the right of the document.
3	Click on the Call Out menu button (...) to the right of the Edit, Share, and Follow options.
4	Click Check Out.


Procedure: Checking In Files

Introduction

When you are finished editing a document, you can check it back in to a SharePoint library to allow others access to edit it.

Procedure

Follow the steps below to check in a SharePoint file.

Task	Description
1	Locate the document that you want to check in.
2	Click on the Call Out menu button (...) to the right of the document.
3	Click on the Call Out menu button (...) to the right of the Edit, Share, and Follow options.
4	Click Check In.  Other users won't see your changes until you check the file back in.
5	Do one of the following on the Check In page: <ul style="list-style-type: none">• Select the type of version you would like to check in (Minor or Major).• Select whether or not to retain your check out after checking in.• Type comments describing what has changed in this version.
6	Click OK .

Procedure: Restoring a Previous Version

Introduction

A benefit of using document versioning is that you can restore a document to a previous version.

Procedure

Follow the steps below to restore a previous version of a file in SharePoint.

Task	Description
1	Locate the document whose version you wish to restore.
2	Click on the Call Out menu button (...) to the right of the document.
3	Click on the Call Out menu button (...) to the right of the Edit, Share, and Follow options.
4	Click on Version History from the context menu.
5	Hover over the Modified column to locate an older version of the document you wish to restore and click the drop-down arrow.
6	Choose Restore from the menu.

Follow Feature

It is possible to Follow items in SharePoint. When you follow an item (document, site, or people) in SharePoint, you see updates to them in your newsfeed.

Procedure: Setting up the Follow Feature

Introduction

You can set up the following feature for a variety of entities in SharePoint, such as documents or sites.

Procedure

Follow the steps below to set up the Follow feature in SharePoint.

Task	Description
1	Navigate to a library.
2	Click on the Call Out menu button (...) to the right of the document.
3	Click on Follow .
4	Navigate to a site you wish to follow.
5	Click on Follow in the upper righthand corner.

Reviewing Version History

You may find it is simply easier to review the entire version history of a document or file, rather than follow a document. The version history contains information about when the item or file was changed and who changed it.

The version history also contains changes to properties, sometimes known as metadata. Examples are when someone changes the name of the person whom the list item is assigned to, or when the file is due to be completed. To view the version history, you must have permission to read items in a list or library.

Additional Notes

Record any notes from the module that you feel are critical in the space below.

[illegible]



Activity: Views and Version Control Review

Test your understanding of SharePoint Views and Version Control

Instructions

1. Read the questions below.
2. Indicate the best answer in the space provided.

Questions

1. B Which of the following is NOT a reason to change views of content in SharePoint?
 - a. To call attention to specific data by displaying it at the top of a list.
 - b. To make content harder to locate.
 - c. To make content easier to read by grouping related information together.
 - d. To display different content based on the user audience on the same page.
2. _____ Which is NOT a SharePoint-provided view format users can use to create their own tailored views?
 - a. Standard View
 - b. Calendar View
 - c. Datasheet View
 - d. Priority View
3. B The view option that displays a subset of data and hides any item that does not share that one characteristic:
 - a. Sort
 - b. Filter
 - c. Group
 - d. Columns
4. A The view option that lists your data in ascending or descending order:
 - a. Sort
 - b. Filter
 - c. Group
 - d. Columns

5. C The view option that organizes your data into sub-sets:
- a. Sort
 - b. Filter
 - c. Group
 - d. Columns



Activity: Change Views and Version Control Settings

To practice changing views and version control settings on a SharePoint site using the steps presented in this course.

This activity should take no more than 20 minutes to complete.



This activity is required because it sets the foundation for other activities in subsequent modules

Instructions

Follow the steps below to change views and version control settings.

Task	Description
1	Using the participant guide and your notes, access the training environment and navigate to the site you created in a previous activity.
2	Navigate to the Document Library you created earlier.
3	Create a public view that groups data by Portal service area.
4	Change the version settings to track as many as five previous versions.
5	Follow one of your documents as well as the site you created previously.
6	Open one of the documents, edit it or its settings and save it as a new version.
7	Restore the document you edited in Step 5 to its previous state.



This participant guide presents the basic steps to perform this activity.

Module 6: Additional Features

Microsoft SharePoint provides a wide variety of features that help you manage and share information quickly and efficiently. Many of these features have been discussed throughout this course. This module provides a review of additional features that you can use to manage discussion boards, surveys and RSS feeds.

Module Objectives

At the completion of this module, you will be able to:

- Create a Discussion Board.
- Create a Survey.
- Set up an RSS feed.

Additional SharePoint Features

Discussion Boards

Discussion boards are a method of having a conversation through posted topics and responses online. Each separate topic and its corresponding response are called “threads.” Discussion boards are perfect for asynchronous group discussions, online brainstorming, and answering questions in a public forum.

A single discussion board can have multiple threads with each thread having multiple responses. SharePoint will also let you change how you view the discussion from flat (one response posted after another) to threaded (responses branch from previous comments).

A discussion board is included as part of the SharePoint 2013 installation.


Procedure: Creating a New Discussion

Introduction

You can set up a discussion board to manage and track discussions with other SharePoint users.

Procedure

Follow the steps below to create a new discussion in SharePoint.

Task	Description
1	Click on the Team Discussions web part on your team site.
2	Click on the + Add new discussion link.
3	Type the subject of the discussion in the Subject field.
4	Type any message in the Body field.  You may copy and paste content, format and spell check your text, or add an attachment by using the ribbon tools.
5	Click Save .

Surveys

Surveys are a good way of collecting feedback from an audience by soliciting responses to an online questionnaire that is tracked on your site. In SharePoint, surveys are lists.



You may copy and paste content, format and spell check your text, or add an attachment by using the ribbon tools.


Procedure: Creating a Survey

Introduction

Create a survey to collect data from other SharePoint users.

Procedure

Follow the steps below to create a survey in SharePoint.

Task	Description
1	Click Settings located near your name in the upper right hand corner.
2	From the settings menu, select site contents and on the resulting content page, click Add an app.  If you do not see the site contents menu, you may not have permission to create a site.
3	Search for Survey in the Find an app search box and click Survey .
4	Click Advanced Options.
5	Type a name for the survey in the Name field. The name is required. The survey name appears: <ul style="list-style-type: none">• at the top of the survey page,• as part of the web address for the survey page, and• in navigational elements that help users to find and open the survey.
6	Type a description of the survey in the Description field. The description is optional.

Task	Description
7	In the Survey Options section, <ul style="list-style-type: none"> Specify whether you want people's names to appear with their responses and/or whether people can respond more than once to the survey.
8	Click Next . The New Question page displays.
9	Enter your question text and then select the type of answer that you want in the Question and Type section.
10	In the Additional Questions Settings section, specify additional settings for your question, such as whether the answer is required.
11	In the Column Validation section, enter the formula you want to use for validation in the Formula field, if you want to check whether an answer is valid.
12	Describe what the user needs to do to ensure the answer is valid in the User Message field.
13	Do one of the following: <ul style="list-style-type: none"> Click Next Question to create additional questions, and then enter information for the next question. Continue the process until you add all the questions that you want. Click Finish if you are finished adding questions.
14	Use the survey settings page to modify the survey questions, change question sequence, add branching logic, or modify survey settings.

RSS Feeds

Really Simple Syndication, or RSS, feeds pull information from other sites to a central location of your choice. It's a great way to stay on top of news, announcements, blogs, and press releases without having to visit those sites to find their new content. SharePoint users subscribe to 'feeds' at the source site and view them through a Web Part (one feed per Web Part).


Procedure: Creating RSS Feeds

Introduction

You can create RSS Feeds to follow a variety of sites both internal and external to SharePoint.

Procedure

Follow the steps below to set up RSS feeds in SharePoint.

Task	Description
1	Click Settings located near your name in the upper right hand corner.
2	Click Edit Page.  If you do not see the Edit Page menu button or if the option to create a new page does not appear, you may not have permission to create a page.
3	Click on the Add a web part button in the page location where you want your RSS Feed to be located.
4	Click on the Content Rollup category.
5	Click on the RSS Viewer Web Part.
6	Click the Add button.
7	Click on the Open the tool pane link in the <i>RSS Viewer</i> web part.
8	Paste a website RSS feed address into the RSS Feed URL field.
9	Click OK .
10	Click Save and Close.

Additional Notes

Record any notes from the module that you feel are critical in the space below.

This image shows a blank sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.



Activity: Additional Features Review

Test your understanding of discussion boards and RSS feeds.

Instructions

1. Read the questions below.
2. Write the answer to each question in the space provided.

Questions

1. _____ Which of the following is NOT a benefit of using Discussion Boards in SharePoint?
 - a. They allow users to communicate without meeting live or in person.
 - b. They create a historical record of conversations and decisions for future reference.
 - c. They require contributions from all parties to resolve discussion threads.
 - d. Email notifications can be set up to alert key users to conversation progress so the site does not need to be actively monitored.
2. _____ Which of the following is NOT a recommended method for making surveys available to users in SharePoint?
 - a. Adding user e-mails to the survey configuration so it will be sent to them once the survey is completed.
 - b. Create a separate survey for each user to complete individually.
 - c. Opening the survey and copying the URL before entering any data so it can be emailed separately to users.
 - d. Saving the link to the Quick Launch menu on a site where it can be easily found.
3. _____ Really Simple Syndication (RSS) feeds do which of the following:
 - a. Pull information from other sites to a central location of your choice.
 - b. Provide a great way to stay on top of news, announcements, blogs, and press releases without having to visit those sites to find their new content.
 - c. SharePoint users subscribe to 'feeds' at the source site and view them through a Web Part (one feed per Web Part).
 - d. All of the above.



Activity: Add Additional Features to Sites

To practice adding additional features to a SharePoint site using the steps presented in this course.

This activity should take no more than 30 minutes to complete.



This activity is required because it sets the foundation for other activities in subsequent modules

Instructions

1. Using the participant guide and your notes, access the training environment and navigate to the site you created in a previous activity.
2. Add a Discussion Board to the site you created in previous modules and post at least one response.
3. Create a Survey
4. Add two SharePoint RSS Viewer Web Parts to your site and pull two different feeds from different websites on the Internet.

Module 7: Resources

There are many resources available online to help you better understand SharePoint.

Module Objectives

At the completion of this module, you will be able to:

- Utilize Microsoft SharePoint online help.
- Locate SharePoint support resources immediately available to you and your institution.

Finding Help

Online Help

As with any Microsoft product, SharePoint has dynamic and robust Help features. When you click on the Help button, you can use the Search box to search by keyword to find helpful topics in a variety of media such as articles, videos, written procedures, links to training courses, or blog entries. You can also access the Microsoft SharePoint Help website directly to browse for help topics. The SharePoint help site is organized into different categories to help you find your answer quickly and easily.

Locating Supporting Resources

The most comprehensive online resource regarding SharePoint is Microsoft's own SharePoint product website (<http://sharepoint.microsoft.com>) where you can watch videos about the product, research features, and review examples of SharePoint sites for ideas.

An additional helpful resource is Microsoft TechNet (<http://technet.microsoft.com/en-us/>) where you can use Support to find an answer to a technical issues, look up a KB article or search by error code. Use Forums to search for an answer to your question, or ask a question if you can't find the answer.



Activity: Online Help Review

To practice finding answers to questions using Microsoft Support Sites and Online Help.

This activity should take no more than 20 minutes to complete.

Instructions

1. Using the participant guide and your notes, access the training environment and navigate to the site you created in a previous activity.
2. Answer the following questions using SharePoint Online Help and the Microsoft Support sites mentioned in this module.

Questions

1. List three key ways information is shared through your My Site?

2. It is possible to view videos using Help. Use the Get Started with SharePoint topic to locate the video: Understanding Permissions in SharePoint. How long is the video?

3. List the four options described in the document collaboration spectrum.

4. If you create a List called Contracts, a List View Web Part called _____ will be available in the _____.

Course Summary

In this course, we have provided instruction on the basic features and functionality available in SharePoint 2013. After taking this course, you should be able to:

- Explain how the different components of the Ellucian Portal, Microsoft SharePoint environments, Ellucian Colleague, LDAP interaction.
- Use basic SharePoint functionality and terminology.
- Navigate SharePoint.
- Create SharePoint sites.
- Explain SharePoint permissions.
- Create and edit libraries, lists, sites, pages, and web parts.
- Create custom lists and columns.
- Sort and filter lists.
- Create views.
- Use versioning with your documents.
- Describe discussion boards and RSS feeds used in SharePoint.
- Utilize SharePoint support resources.

Group Discussion: What are the Most Important Things You Learned in This Course?



Activity: Key Points to Remember

Within this course, you were presented with a lot of content and several activities designed to help you learn about SharePoint. The purpose of this activity is to check your understanding as well as serve as a summary of the course topics.

Instructions

Fill in the blanks. Feel free to use any notes and your participant guide. Your instructor will provide you with the answers.

1. A _____ is an access point to information under a unified look and feel.
2. A _____ is a “container” for sub-sites, pages, lists, and libraries.
3. A _____ is a container for holding documents and pictures.
4. A _____ is a tool that can display content in a standard or customized fashion.
5. SharePoint is a great _____ and _____ management tool.
6. The two main types of sites are _____ and _____.
7. The level of permission that contains all permissions, can manage all permissions, and can delete the site is _____.
8. List two standard SharePoint Web Parts and two Ellucian-delivered Web Parts:

Standard SharePoint

Ellucian-delivered



- What kinds of sites does your institute need to create? Which are the highest priorities?
- Who should have permissions to design and edit content on these sites?
- What SharePoint features will be most helpful to your institution?

Ellucian Portal | SharePoint Overview

Next Steps



Activities

1. Complete the following activities:
 - a. Finish any outstanding activities in this course.
 - b. Continue to experiment with different sites, libraries, list, and Web Part configurations on your institution's test environment. You'll want to reference this experience when you meet with your consultant.
 - c. Create a Portal Implementation Team Site for your institution (see Appendix B: Homework).
2. Prepare for your consulting sessions. The topics for your consulting session, which will build upon what you have learned in this class, include:
 - Building content
 - Calendaring
 - Constituency set up and layout
 - Training content contributors
 - Team Sites and Sites
 - Permissions
3. Enroll as appropriate in subsequent Ellucian Portal Administration courses:
 - Ellucian Portal Administration for Colleague - Structures.
 - Ellucian Portal Administration for Power Campus – Structures
 - Ellucian Portal Administration for Colleague – Maintenance
 - Ellucian Portal Administration for Power Campus – Maintenance
 - Ellucian Portal Administration - Course Catalog

Appendix A: Answer Key

Introduction

This appendix provides answers to select activities in the participant guide. (Answers are in red text.) Refer to the section of the participant guide and/or the name of the activity to locate the answers for the activity.

Module 3: Sites and Pages

Activity: Site Types

1. The site we're creating will filter information to our entire faculty, not just those in the Education Department.

I **Template:** ____ **Constituency Site** ____

2. I go to this site to find all the information pertaining to my Social Media 320 class.

C **Template:** ____ **Class Site** ____

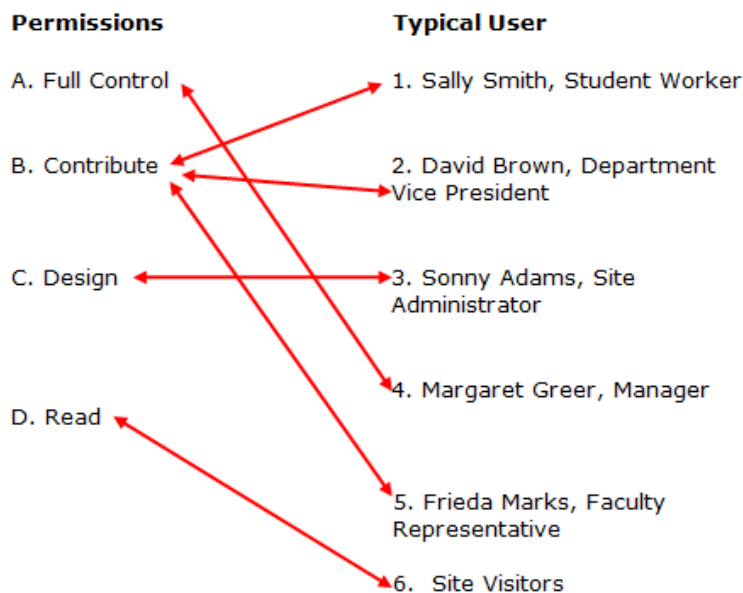
3. Our sorority made some t-shirts for the event that you can buy on our site.

C **Template:** ____ **Social Team Site** ____

4. You can check out this week's menu on the Dining Hall site.

I **Template:** ____ **Ellucian Publishing Site** ____

Activity: Match Permissions



Module 4: Libraries and Lists

Activity: Libraries and Lists Review

1. C SharePoint content:
 - a. is only displayed in lists.
 - b. can only be displayed in libraries.
 - c. can be displayed in lists or libraries or even Web Parts.
 - d. is hard to navigate.
2. D The benefit of using libraries is:
 - a. that files can be stored in a single location.
 - b. that files can be linked to numerous other locations.
 - c. that users can capture metadata and store version history for each of these files.
 - d. All of the above.
3. B When adding a new column to a library or list, the Column Type that allows users to choose from a list of responses you specify is:
 - a. Multiple Lines of Text.
 - b. Choice.
 - c. Number.
 - d. Additional Columns.

Module 5: Views and Version Control

Activity: Views and Version Control Review

1. B Which of the following is NOT a reason to change views of content in SharePoint?
 - a. To call attention to specific data by displaying it at the top of a list.
 - b. To make content harder to locate.
 - c. To make content easier to read by grouping related information together.
 - d. To display different content based on the user audience on the same page.
2. D Which is NOT a SharePoint-provided view format users can use to create their own tailored views?
 - a. Standard View
 - b. Calendar View
 - c. Datasheet View
 - d. Priority View
3. B The view option you would select to organize your data by displaying a subset of data and hiding any item that does not share that one characteristic:
 - a. Sort
 - b. Filter
 - c. Group
 - d. Columns
4. A The view option you would select to organize your data in ascending or descending order:
 - a. Sort
 - b. Filter
 - c. Group
 - d. Columns
5. C The view option you would select to organize your data into sub-sets:
 - a. Sort
 - b. Filter
 - c. Group
 - d. Columns

Module 6: Additional Features

Activity: Additional Features Review

2. C Which of the following is NOT a benefit of using Discussion Boards in SharePoint?
- a. They allow users to communicate without meeting live or in person.
 - b. They create a historical record of conversations and decisions for future reference.
 - c. They require contributions from all parties to resolve discussion threads.
 - d. Email notifications can be set up to alert key users to conversation progress so the site does not need to be actively monitored.
3. B Which of the following is NOT a recommended method for making surveys available to users in SharePoint?
- a. Adding user emails to the survey configuration so it will be sent to them once the survey is completed.
 - b. Create a separate survey for each user to complete individually.
 - c. Opening the survey and copying the URL before entering any data so it can be emailed separately to users.
 - d. Saving the link to the Quick Launch menu on a site where it can be easily found.
4. A Really Simple Syndication (RSS) feeds do which of the following:
- a. Pull information from other sites to a central location of your choice.
 - b. Provide a great way to stay on top of news, announcements, blogs, and press releases without having to visit those sites to find their new content.
 - c. SharePoint users subscribe to 'feeds' at the source site and view them through a Web Part (one feed per Web Part).
 - d. All of the above.

Module 7: Resources

1. List three key ways information is shared through your My Site?

Answer may include any three of the following:

- Content on your My Site, including documents, lists, and blogs
 - Tags and notes that you apply to pages and documents
 - Suggested keywords and colleagues that you have approved, which can be used to quickly update your My Site so you can engage with others
 - Personal information, such as contact information, interests, responsibilities, colleagues, and e-mail list memberships in your profile, and any updates you make to your profile details
-
2. It is possible to view videos using Help. Use the Get Started with SharePoint topic to locate the video: Understanding Permissions in SharePoint. How long is the video?

3.51

3. List the four options described in the document collaboration spectrum.

1. Semiformal co-authoring.
2. Formal co-authoring
3. Comment and review.
4. Document sets.

4. If you create a List called Contracts, a List View Web Part called **Contacts** will be available in the **<Site Name> Gallery**.

Summary

Activity: Key Points to Remember

1. A Portal is an access point to information under a unified look and feel.
2. A Site is a “container” for sub-sites, pages, lists, and libraries.
3. A Library is a container for holding documents and pictures.
4. A Web Part is a tool that can display content in a standard or customized fashion.
5. SharePoint is a great content and collaboration management tool.
6. The two main types of sites are Informational and Collaborative.
7. The level of permissions that contains all permissions, can manage all permissions, and can delete the site is Full Control.
8. List two standard SharePoint Web Parts and two Ellucian-delivered Web Parts:

Standard SharePoint	Ellucian-delivered
Ex., Content Editor	Ex., WebAdvisor
Ex., This Week in Pictures	Ex., Pictures of the Week

Appendix B: Homework

Introduction

This appendix describes your (optional) homework assignment to be completed at your own pace following the completion of this course.

Directions

The creation of a Portal Implementation Team site is an important part of your institution's preparation for implementing Ellucian Portal. Using the lessons learned throughout this course and the following steps, begin building a site for your institution's Portal Implementation Team.



Some of the steps listed may not have been addressed in this course, intentionally. These “new” features or tasks are meant to encourage you to continue discovering SharePoint's capabilities on your own.

Task	Description
1	<p>Create a Portal Project Team Site.</p> <ol style="list-style-type: none">Create this site in your production environment. If production is not yet installed, create it in your test environment and see your Portal Consultant for assistance with migrating your site to production.Ellucian recommends you create a top level site called “Committees” to house project sites such as this one. Navigate to the root level of your portal and follow the steps to create a site. Be sure to use the “Ellucian - Aggregator for SubSites” template.Once you have created your Committees aggregator site, follow the steps to create a site for the Portal Project. Be sure to use the “Ellucian – Committee Team Site” template.Once you have created your Portal project site, follow these steps to enable some additional SharePoint features:<ol style="list-style-type: none">Click the Settings [gear] button.Click Site Settings.Click Manage Site Features.Click Activate next to any of the following Site Features you have that are not currently active:<ul style="list-style-type: none">SharePoint Server Enterprise Site FeaturesSharePoint Standard Site FeaturesTeam Collaboration Lists.

Task	Description
2	Change the “Welcome to your site!” page text to represent an intro to your portal project team site.
3	Change the default image to your team picture (or remove it altogether).
4	Remove the “Getting Started” content.
5	Show the Announcements list as a Web Part and in the Quick Launch.
6	Set the Announcements list Expires column to default to seven days and to be required.
7	Modify the view of the Announcements Web Part to meet your display preferences, for example: <ul style="list-style-type: none"> a. Hide expired announcements b. Display the announcement body
8	Show the Team Discussion list as a Web Part.
9	Show the Tasks list as a Web Part.
10	Modify the view of the Tasks Web Part to meet your display preferences, for example: <ul style="list-style-type: none"> a. Hide completed tasks b. Show title, assigned to, and due date
11	Create an Issue Tracking list.
12	Show the Issue Tracking list as a web part.
13	Modify the view of the Issue Tracking Web Part to meet your display preferences, for example: <ul style="list-style-type: none"> a. Show active issues b. Show title, assigned to, and due date
14	Show Links list as a Web Part and in the Quick Launch.
15	Modify the view of the Links Web Part to meet your display preferences, for example: <ul style="list-style-type: none"> a. Hide the columns except for the URL column b. Change the URL column name to title

Task	Description
16	<p>Create custom columns in your Shared Documents library to store metadata about your project documents, for example:</p> <ul style="list-style-type: none"> a. Document Type (Agenda, End User Documentation, Presentation, Reference Material, Training Material) b. Portal Area (Branding, Colleague, Communications, Governance, SharePoint, Taxonomy, Technical, Training) <p>Comments</p>
17	Modify your Shared Documents library settings to not allow the New Folder Command.
18	<p>Modify the view of the Shared Documents Web Part to meet your display preferences, for example:</p> <ul style="list-style-type: none"> a. Show additional custom columns b. Group by Portal Area
19	<p>Add helpful links to your Links list, for example:</p> <ul style="list-style-type: none"> a. Ellucian Portal documentation: https://ellucian.force.com/clients/sfc/#workspaces b. Ellucian Knowledge Articles: https://ellucian.force.com/clients/knowledge/knowledgeHome.aspx
20	Upload appropriate SharePoint documentation to your Shared Documents.
21	Add upcoming consulting engagements to your calendar.
22	Create an alert (and have all portal project team members as well) on your announcement list.

Links to videos

Video 1:

<https://www.youtube.com/watch?v=AKFTQ90Z3Hg>

Video 2:

<https://youtu.be/XC8nuXtJofE>