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# **SharePoint User Guide**

If you can't remember your password or are having problems logging into SharePoint, please contact VoiceMailTel Helpdesk by e-mail support@voicemailtel.com or telephone at 866-686-4236 or 416-548-7388





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## WHAT IS SHAREPOINT?

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

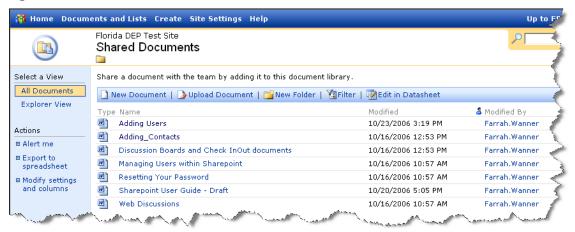


#### **DOCUMENT LIBRARIES**

Document Libraries are collections of files that you can collaborate and share with team members. A document library is comprised of files and folders. Files and folders in SharePoint are organized in the same way as they are on your computer's C: drive or a network file share.

SharePoint sites can have one or more document libraries. Any file can be a document; however, document libraries integrate best with Office 2003 documents.

Figure 1: SharePoint Shared Documents



#### **Shared Document Page's Notable Features**

**Select a View** – This area in the top left corner selects all the available formats for listing documents in the library. By default, there are two such formats:

- O All Documents Displays one line of text for each document in the library.
- Explorer View Lists the library contents in a format resembling Microsoft Windows Explorer. This is available only on Windows versions of Internet Explorer.
- ① Actions –Additional commands for working within library documents.
- Alert Me The Alert feature sends e-mail notifications to interested team members whenever another member changes some aspect in the Shared Document library.
- Export to Spreadsheet Downloads an Excel query file that points to the library content list. After opening this file in Excel, authorized team members can download, modify or export the content list.
- Modify Settings and Columns Displays a Customization page that modifies the name, description, columns, views and other settings.

Main Document Area – Display a listing of documents in the current open library. To sort on any field, click the field's column heading (that is, click Type, Name, Modified, Modified By, or Checked out To). It also provides a toolbar with these links:

- New Document Downloads a document template to your computer, which the corresponding application then opens with the current library as the default save location. If the library has no defined template, the default is an empty Microsoft Word document.
- Upload Document Displays an Upload Document page that allows you to upload one or more documents from your computer or network drive and adds it to the library.

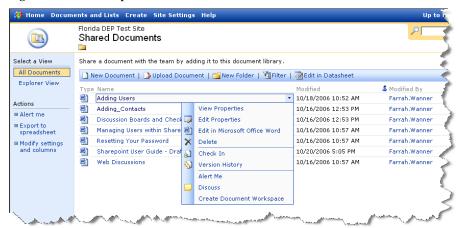


- New Folder Displays a New Folder page for creating an additional folder within the current open library.
- Filter Refreshes the current Web page, adding selection controls above the selectable column heading. These controls filter the list of documents based on the criteria specified.
- Edit In Datasheet Displays the list of documents as an editable table that resembles a spreadsheet. If Access or Excel 2003 is installed on the user's computer, this view also provides a task bar for exchanging data with those programs.

#### **Document Options Menu**

To display the document options in a shared document library, hover your mouse over the file name and click on the down arrow. The following options are displayed:

Figure 2: Document Options Menu



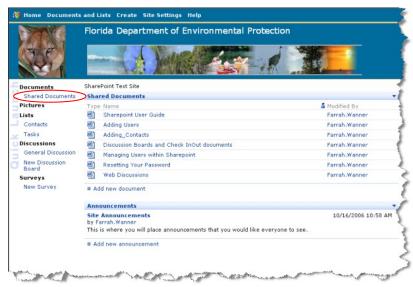
- ① **View Properties** Displays all available information about the document.
- ① Edit Properties Displays a page where you can modify the document's name or title.
- Edit in Microsoft Office Opens the document for editing in Microsoft Office.
- Delete Deletes the document from the document library.
- Check-In/Check-Out Prevents anyone but you from updating the document (after you select this option, it changes to Check In).
- Version History Displays a history of updates to the document.
- ◆ Alert Me The Alert feature of a Team Site sends e-mail notifications to interested team members whenever another member changes some aspect of the selected file.
- ① **Discuss** Displays the document, including comments from other team members, and a toolbar that you can use to make comments yourself.
- Create Document Workspace Creates a specialized SharePoint site for the sole purpose of organizing material related to the current document. This option is only available if your account is assigned to the Contributor or Administrator group.



### How to Upload a Single Document

1. From the Quick Launch bar on the left hand side of your Home Page, select Shared Documents.

Figure 3: SharePoint Home Page



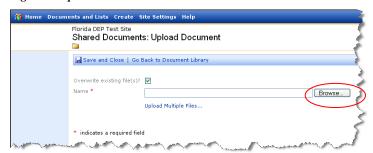
2. Select **Upload Document** from the document library toolbar.

Figure 4: Shared Documents



3. Click on Browse.

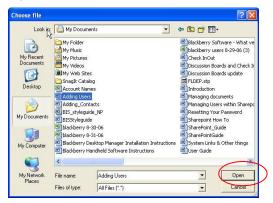
Figure 5: Upload Document



4. Highlight the file you want to upload, and click Open.

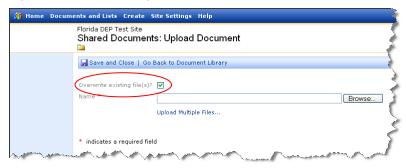


Figure 6: Browse Files



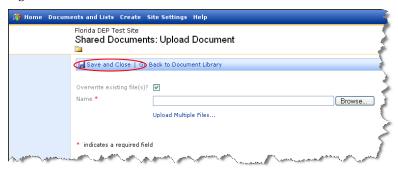
5. Verify that you want to **Overwrite existing file(s)**. If a file of the same name already exists in the document library, you can force the file to be replaced by selecting the checkbox. This will save in **Version History**.

Figure 7: Overwrite Existing Files



6. Click the **Save and Close** button to upload the document to the document library.

Figure 8: Save and Close



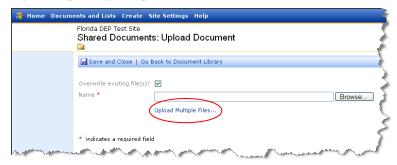
### **Uploading Multiple Documents**

- 1. From the **Quick Launch** bar on the left hand side of your **Home Page**, select **Shared Documents** as shown in Figure 3.
- 2. Select **Upload Document** from the document library toolbar as shown in Figure 4.



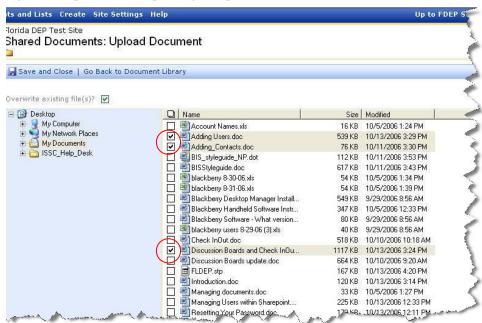
3. Click on Upload Multiple Files...

Figure 9: Uploading Multiple Files



4. This will open the **Explorer View**. Select the location and select the files you want to upload by selecting their corresponding checkbox.

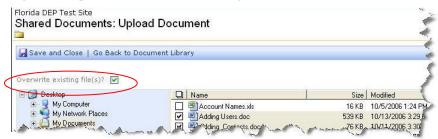
Figure 10: Explorer View – Uploading Multiple Documents



5. Verify that you want to **overwrite existing file(s).** If a file of the same name already exists in the document library, you can force the file to be replaced by selecting the checkbox. This will save in **Version History**.



Figure 11: Explorer View - Overwrite Existing Files



6. Click on Save and Close.

Figure 12: Explorer View - Save and Close



7. A Dialogue box will appear confirming your upload. Select **Yes** if you want to execute the upload. Otherwise, select **No** to cancel the upload.

Figure 13: Confirmation of Upload Dialogue Box



### **Creating Folders**

There are two ways to create a folder in the document library. All Documents view:

- 1. From the **Quick Launch** bar on the left hand side of your **Home Page**, select **Shared Documents** as shown in Figure 3.
- 2. Select All Documents under Select a View in the left hand navigation bar.



Figure 14: Shared Documents - All Documents View



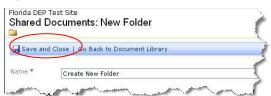
3. Select New Folder.

Figure 15: All Documents – New Folder



4. The document library **New Folder** page will be displayed. In the **Name** field, enter a name for the folder you wish to create and then click **Save and Close**.

Figure 16: New Folder



#### **Explorer View:**

- From the Quick Launch bar on the left hand side of your Home Page, select Shared Documents shown in Figure 3.
- 2. Select Explorer View under the Select a View in the left-hand navigation bar.



Figure 17: Shared Documents - Explorer View



3. Click Cancel on the Login window(s) that appear.

Figure 18: Login Window



4. Right click in the area where the other files and documents are listed and from the drop down box select New → Folder.

Figure 19: Explorer View - Creating a New Folder





### **EDITING SHARED DOCUMENTS**

We highly recommend **Checking Out** documents before editing them. This prevents other people from editing the same document that you are working on. However, this does not prevent other people from viewing documents that are checked out.

#### **Using Check In / Check Out**

To Check Out a document in SharePoint:

1. Hover your mouse over the file name and click on the down arrow on the file you want to edit, as displayed below. Select **Check Out** from the pull down menu selection.

Figure 20: Document Check Out



- 2. Once you've completed working on the document and have saved it, check it back in. There are two ways to do this.
  - a. In Microsoft Word, click the **File** Menu and select **Check In**. You will receive this message and have the following options:

Figure 21: Check In Dialogue Box

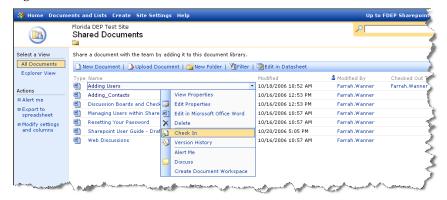


OR

b. In **Shared Documents**, hovers your mouse over the file name you have checked out, and click on the down arrow. Select **Check In** from the pull down menu.



Figure 22: Shared Documents - Check In



c. You will be prompted for **Check In Comments**. After you enter your comments and click **OK**, the comments will be available for view by other team members.

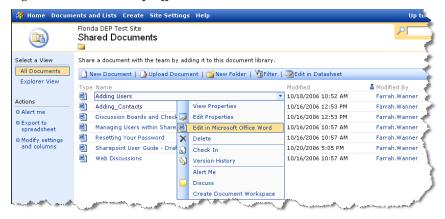
Figure 23: Check In Comments



#### **Editing Documents**

- 1. To edit a shared document: From the **Home Page**, click on **Shared Documents** on the **Quick Launch** Bar as shown in Figure 3.
- Hover your mouse over the file name you want to edit, and click on the down arrow. Select Edit in Microsoft
  Office Word (Excel, Access, etc) from the pull down menu selection.

Figure 24: Edit in Microsoft Office

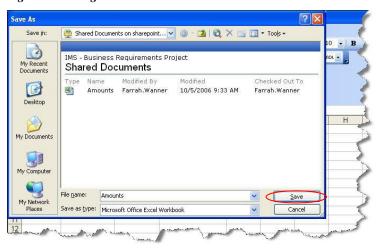


**NOTE:** If you click directly on the document name or select **View Properties** from the pull down selection, the document will open as **READ ONLY**.



3. Saving changes to shared Microsoft Office documents works the same as with any document stored locally on your hard drive or network drive. Just type CTRL-S or click on File from the menu bar and select Save to save changes.

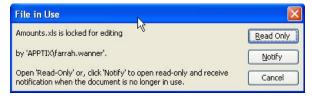
Figure 25: Saving Documents



### **Editing a Microsoft Excel Document that is Checked Out**

If you try to open an Excel document that is already checked out, you will receive the following Dialogue window:

Figure 26: Editing a Checked Out Excel Document



- 1. **READ ONLY**: Opens a **Read Only** copy you will not be able to edit and/or save changes to the document.
- 2. **NOTIFY**: This will open a **Read Only** copy. However, if the document is checked in while you still have it open, a message will appear indicating the document is now available for editing. Click on **Read-Write** which will then allow you to edit and save the changes.

Figure 27: Word File Is Now Available Dialogue Box



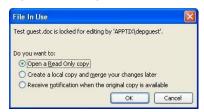
3. **CANCEL**: Will not open the document for editing.



#### Editing a Microsoft Word document that is Checked Out

If you try to open a Word document that is already checked out, you will receive the following dialogue box indicating that **This file is locked for editing**.

Figure 28: Editing a Checked Out Word Document



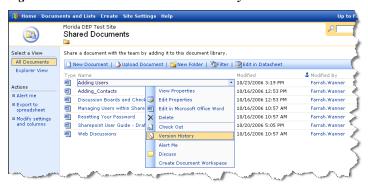
- 1. **READ ONLY: Opens a Read Only copy.** You will not be able to edit and save changes to the document.
- LOCAL COPY: Creates a local copy and will merge your changes later. Same as Option One; acts as Read Only.
- 3. **NOTIFY:** Receive notification when the original copy is available This will open a Read Only copy. However, if the document is checked in while you still have it open, a message will appear indicating the document is now available for editing. Click on Read-Write, which will then allow you to edit and save the changes to the document as shown in Figure 27.
- 4. **CANCEL:** Will not open the document for editing.

#### **Using Document Versions**

With Document Versions turned on, SharePoint will retain not only the current version of each document, but all historical versions as well. Any team member can then use the following procedure to investigate the version history of a document.

- 1. From the **Quick Launch** bar on the left hand side of your **Home Page**, select **Shared Documents** as show in Figure 3.
- 2. Hover your mouse over the file name of the document you select, and click on the down arrow. Click on **Version History.**

Figure 29: Shared Document – Version History



3. The Versions page displays each version of a document in the current library. To work with these versions, hover your mouse over the file name of the document, and select one of these options:



Figure 30: Version History Options



- View Opens the selected document version.
- Restore Creates a new copy of the document version, and makes it the current version (This will increment the current version number by one).
- ① **Delete** Removes the version from the library.



#### WEB DISCUSSIONS

Web Discussions provide a way to add yellow "Sticky Note" to a document and to share those notes with others – all without actually updating the document itself. This is a possible because the sticky note information resides in a database on a discussion server. The Discuss option is what most Office applications call Web Discussions. Despite the similarity in names, this option has nothing to do with Team Site Discussion Boards. This is a very useful approach because several people can review and annotate the same document simultaneously and then the document owner can see all their suggestions merged together. There are no concerns about someone accidentally updating the document itself, because no one can update the document at all.

You can navigate to Web Discussions for a particular document two different ways.

#### **Accessing Web Discussions From Shared Documents**

- 1. Go to the **Shared Documents** page by clicking on the **Shared Document** link on the **Quick Launch** bar as shown in Figure 3.
- Click on the drop down menu on the file you wish to discuss. Select **Discuss** from the drop down menu selection.

Figure 31: Shared Documents - Discuss



3. Right click on the yellow bar that appears along the top of your screen and select **Download File**.

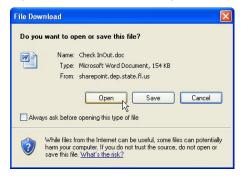
Figure 32: Blocked Download



4. The **File Download** dialogue box will appear prompting you with: **Do you want to open or save this file?** Click **Open**.

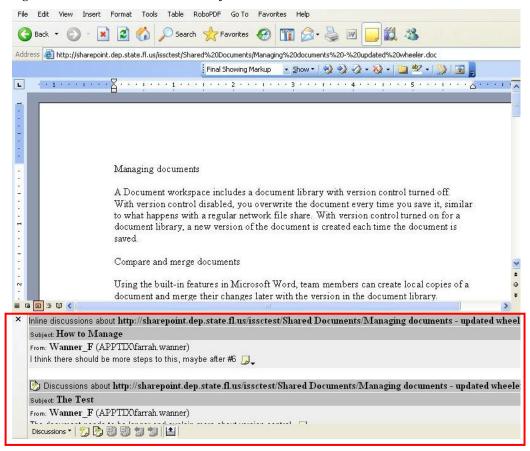


Figure 33: File Download Dialogue Box



5. The **Discussion Toolbar** will now appear on the bottom of the page.

Figure 34: Discussion Toolbar in Microsoft Word

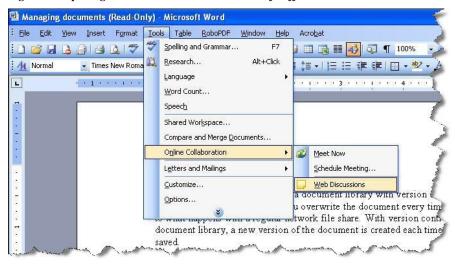


## Accessing Web Discussions From Within a Microsoft Office Application

- 1. Open a document by choosing **Edit in Microsoft Word** (Excel, Access, etc) from the **Shared Documents** page as shown in Figure 24.
- 2. Click on Tools → Online Collaboration → Web Discussions.



Figure 35: Opening Web Discussions within Microsoft Office



#### **Discussion Toolbar**

**Discussion Toolbar descriptions**: (Note that some buttons might be dimmed, depending on the type of document opened.) **Close** – Click this button to close the **Web Discussion Toolbar** within the document.

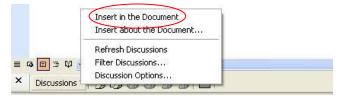
Figure 36: Discussion Toolbar - Close



**Discussions** – Click the **Discussions** button to display a pull down menu containing the following options:

Insert in the Document – Select this option to display or hide all possible locations for inline sticky notes (those that appear inline with the document text). There's one sticky note location per paragraph. To add text to new or an existing sticking note, click it.

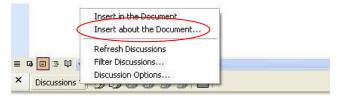
Figure 37: Discussion Toolbar Menu – Insert in the Document



Insert about the Document – Select this option to display an Enter Discussion text box where you can enter discussion comments about the document in general.

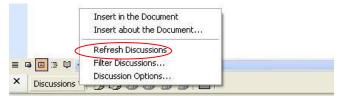


Figure 38: Discussion Toolbar Menu - Insert about the Document



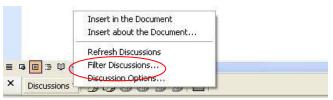
Refresh Discussions – Select this option to retrieve a current set of discussion comments from the discussion server. The display will refresh and now reflect changes other team members might have made.

Figure 39: Discussion Toolbar Menu - Refresh Discussions



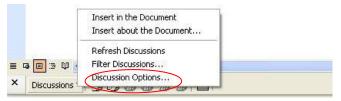
Filter Discussions – Select this option to display discussion comments from only a specific team member, or within a specific time span.

Figure 40: Discussion Toolbar Menu - Filter Discussions



Discussion Options – Select this option to select the discussion server and the discussion fields to display.

Figure 41: Discussion Toolbar Menu – Discussion Options



**Insert Discussion in the Document** – Click this button to perform the same function as in the **Insert in the Document** menu option as described above.

Figure 42: Discussion Toolbar - Insert Discussion in the Document



**Insert Discussion about the Document** – Click this button to perform the same function as the **Insert about the Document** menu option as described above.



Figure 43: Discussion Toolbar - Insert Discussion about the Document



**Expand all Discussions** – Click this button to display the title, text and all other fields for each discussion comment.

Figure 44: Discussion Toolbar - Expand all Discussions



**Collapse all Discussions** – Click this button to hide the contents of all discussion comments. A sticky note with a plus sign appears in place of each comment. To expand a particular comment, click the plus sign.

Figure 45: Discussion Toolbar - Collapse all Discussions



**Previous** – Click this button to display the previous comment.

Figure 46: Discussion Toolbar - Previous



Next – Click this button to display the next discussion comment.

Figure 47: Discussion Toolbar - Next



Show/Hide Discussion Pane – Click this toggle button to display or hide the discussion pane.

Figure 48: Discussion Toolbar - Show/Hide Discussion Pane





#### **DISCUSSION BOARDS**

Discussion boards provide a forum for topics that interest your team. It is a tool which allows groups to communicate online. Each discussion board has icons for starting, sorting, filtering, switching views, or changing designs. Another feature (Web Discussion) allows users to attach comments to a specific SharePoint page or document.

A discussion board is made up of "forums" – folders containing messages on a particular subject, "threads" – each thread is a series of message about the same topic, and "messages" – each message is an individual contribution to a conversation (like a single e-mail).

Team members have the ability to:

- Post/Create new messages.
- ② Respond to an existing message.
- View messages in their entirety or in condensed lists.
- Delete and remove messages they have created. However, team members are unable to delete/remove messages created/editing by other team members.
- Team members do not have the ability to edit message created by other team members on the board. However they can **Edit** messages/responses created by their selves.

**NOTE:** The administrator of the site has the ability to purge and edit threads created by any team member, as well as alter discussion board settings, defaults, etc.

#### To create a new Discussion Board:

1. From your SharePoint Home Page, select the Discussion quick link from the Quick Launch toolbar.

Figure 49: Discussions



2. Click Create Discussion Board.



Figure 50: Create Discussion Board



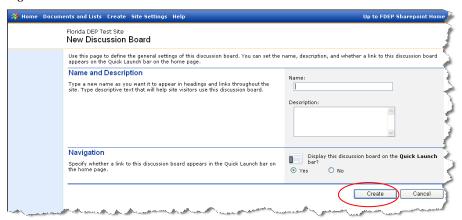
Click on Discussion Board.

Figure 51: Discussion Board Create Page



4. Enter the Name and Description of the Discussion Board you would like to create, and select if you would like to Display this discussion board on the Quick Launch Bar. Click Create.

Figure 52: New Discussion Board

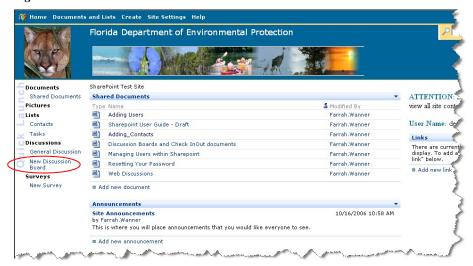


# To Participate in a Discussion

1. From your SharePoint **Home Page**, select the **Discussion Board** link from the **Quick Launch** toolbar on the left side of the page that you would like to participate in.



Figure 53: New Discussion Board



You have the option to do one of the following:

1. Start a **New Discussion** (start your own thread or comment):

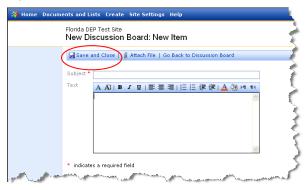
Figure 54: Discussion Board



- a. Click on New Discussion.
- b. In the Subject box, type a title for your comment. This field is required.
- c. In the **Text** box, type your comment. **NOTE:** Team members can also attach files to a Discussion.
- d. Click Save and Close.



Figure 55: New Discussion Thread



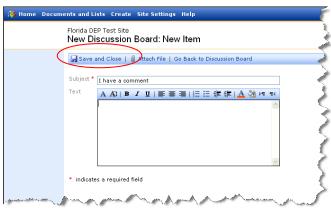
- 2. **Reply** to an existing comment:
  - a. In the **Subject** column, hover your mouse over the discussion comment to which you want to reply. Click the down arrow, and select **Reply** from the pull down menu.

Figure 56: Discussion Board Reply Option



- b. In the **Text** box, type your comment.
- c. Click Save and Close.

Figure 57: Discussion Board Reply



- 3. **Edit** your own discussion comment:
  - a. In the **Subject** column, hover your mouse over the discussion comment you'd like to edit. Click the down arrow, and select **Edit Item** from the pull down menu.



Figure 58: Discussion Board Edit Item



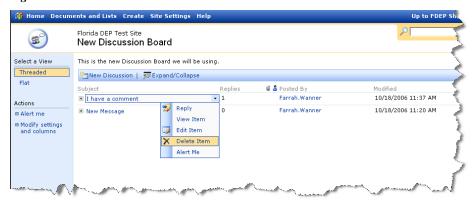
b. Modify the comment as desired, and then click **Save and Close**.

Figure 59: Discussion Board Edit Message



- 4. Delete a discussion comment.
  - a. In the **Subject** column, hover your mouse over the discussion comment you'd like to delete. Click the down arrow, and select **Delete Item** from the drop down menu.

Figure 60: Discussion Board Delete Item



b. Click **OK** to confirm that you want to delete the comment.



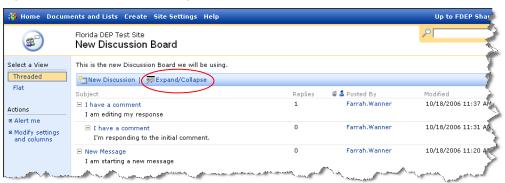
Figure 61: Delete Comment



#### To View All Comments and Replies in a Threaded View

- 1. From your SharePoint **Home Page**, select the **Discussion Board** quick link from the **Quick Launch** bar on the left side of the page that you would like to participate in, as shown in Figure 53.
- 2. Click on Expand/Collapse.

Figure 62: Discussion Board - Seeing all Threads



#### To View All Comments Sorted by Time Posted

- 1. From your SharePoint **Home Page**, select the **Discussion Board** quick link from the **Quick Launch** bar on the left side of the page that you would like to participate in, as shown in Figure 53.
- 2. Under the Select a View on the Quick Launch bar on the left hand side of the page, click on Flat.

Figure 63: Discussion Board - Flat View





#### **ALERTS**

The Alert feature of a Team Site sends e-mail notifications to interested team members whenever another member changes some aspect of the Team Site. Each member decides which lists, libraries, or documents they want to receive alerts about.

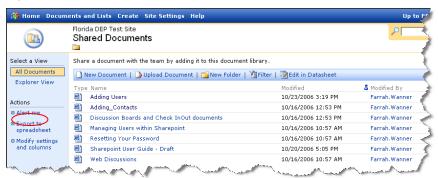
You can specify how frequently you want to receive alerts. You can have them appear immediately, or as daily or weekly summaries. When you no longer need to follow changes for the list, library, item, or file, you can delete your alerts at any time.

#### **Adding an Alert**

There are two ways to add an alert: from the **Shared Documents Library** or from the **My Alerts Page**. To add an alert to all Documents:

1. From your Shared Documents page, under Actions on the Quick Launch bar, click Alert me.

Figure 64: Alert Me



- 2. In the **Send Alerts To** section, confirm that the destination e-mail address is correct.
- 3. In the **Change Type** section, specify whether you want to be notified when items have been **Added**, **Changed**, **Deleted**, or click **All Changes** to be notified whenever any type of change occurs.
- 4. In the **Alert Frequency** section, select the option that reflects how often you want to be notified of changes.
- 5. Click **OK**.

Figure 65: Setting Up New Alert

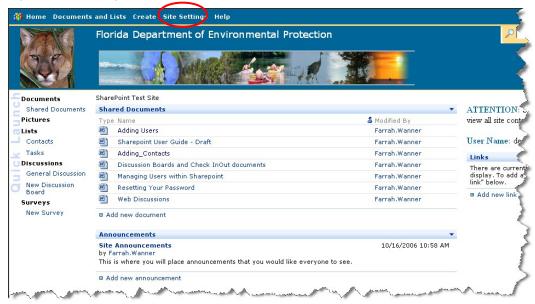


You can also add an alert to a List or Document Library from My Alerts Page:



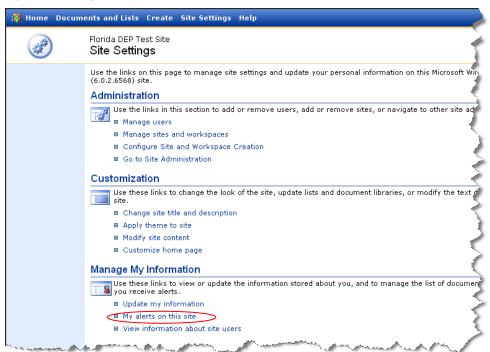
1. From your **Home Page**, click on **Site Settings** on your Main Toolbar.

Figure 66: Site Settings



2. Under Manage My Information, click on My alerts on this site.

Figure 67: Manage My Information – My Alerts on this site



3. Click on Add Alert from the Alert Toolbar.

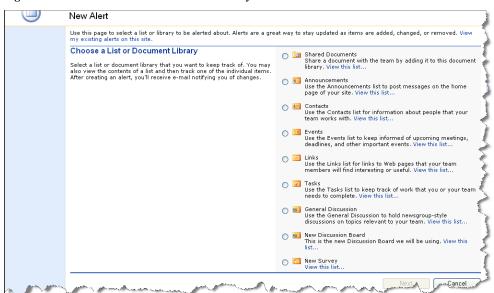


Figure 68: My Alerts on this Site



4. Select the list or library for which you wish to receive an alert message. Click the **Next** button at the bottom of the page.

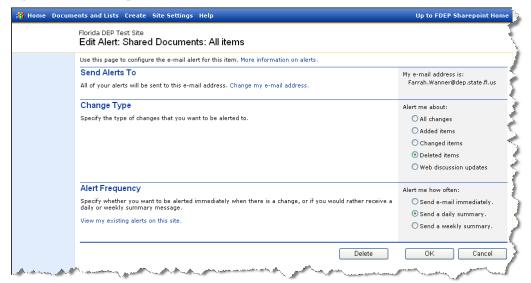
Figure 69: New Alert in List or Document Library



5. Under **Alert Me About**, specify the condition that will generate an alert message:



Figure 70: New Alert Options



- O All Changes Whenever someone adds, changes or deletes an item in the list or library.
- ② Added Items Whenever someone adds an item to the list or library.
- ① Changed Items Whenever someone changes a list or library item.
- ① **Deleted Items** Whenever someone deletes a list or library item.
- Web Discussion Updates Whenever someone comments on a document by using the Web Discussion feature. This option appears only for a document and form library.

If you wish, SharePoint can summarize alert notifications into one daily or weekly e-mail message. To control this, select one of these options under **Alert Me How Often**.

- ② Send E-Mail Immediately Select this option to receive alert notification individually, as they occur.
- Send A Daily Summary Select this option to receive summarized alerts once a day. The administrator configures the time of day when this occurs.
- Send A Weekly Summary Select this option to receive summarized alerts once a week. The administrator configures the day of the week and the time of day when this occurs.

#### **Managing Your Alerts**

- 1. From your **Home Page**, click on **Site Settings** on your **Main Toolbar** as shown in Figure 66.
- 2. Under Manage My Information, click on My alerts on this site as shows in Figure 67.
- 3. To **Edit** an existing alert, click its name in the **My Alerts On This Site** page. This displays an **Edit Alert** page that resembles the **New Alert** page shown previously.



Figure 71: Editing an Alert



a. You can either **Edit** the alert by selecting the **Change Type** and/or **Alert Frequency** you want to change, and then click **OK.** 

#### OR

- b. You can **Delete** the alert by clicking on **Delete**.
- 4. To delete one or more alerts, select the check box for the item. Click the **Delete Select Alerts** toolbar button.

Figure 72: Delete Selected Alerts





## RESETTING YOUR PASSWORD

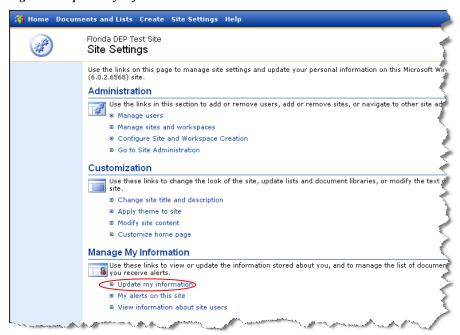
If you can't remember your password or are having problems logging into SharePoint, please contact VoiceMailTel Helpdesk by e-mail support@voicemailtel.com or telephone at 866-686-4236 or 416-548-7388

There are no current requirements for Passwords (i.e. number of characters required, numbers required, etc).

To reset your password from within SharePoint:

- 1. From your SharePoint **Home Page**, click on **Site Settings** as shown in Figure 67.
- 2. Click on Update My Information under Manage My Information.

Figure 73: Update My Information



3. From the User Information page, click on Change Password.

Figure 74: User Information



4. Enter your new password twice to confirm it is accurate, and click **OK**.



Figure 75: Change Password

