



CONSUMER
TALENT
ACQUISITION

Recruiter Academy Program Training

Introduction to SharePoint 2010



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SharePoint 2010 Introduction

We will be using a Microsoft tool called SharePoint 2010 extensively during the RAP to manage files that you'll be creating and updating during the RAP. It is important for you to understand some basics about using this tool.

Objectives

In this training you will learn how to:

- When to check documents in and out vs. saving and reading offline
- Access our Recruiter Academy SharePoint site
- Navigate in the site
- Create new folders
- Add a document to a SharePoint folder
- Add multiple documents to a SharePoint folder
- Check documents in and out of SharePoint to edit them
- Troubleshoot locked documents
- Renaming documents

What is a SharePoint Site?

SharePoint is a browser-based tool that allows you to access documents to either read, edit, or collaborate with others on.

- It is a collaboration tool
- It acts like a library system for documents
- Operates on the web and can be accessed from anywhere
- Best accessed with Internet Explorer so make sure you create a bookmark from IE to SharePoint (not from other browsers) and not from Edge!

You must check documents out to edit them and then check them back in when you've completed your changes. While you have a document checked out, no one else can edit it. See more about this at [To Check Out a File to Edit](#).

When to Check Documents In and Out

- You will want to use the check in and out process when working on documents for your cohort on the events you'll be sourcing for.

- You will not want to check documents in and out that are part of our training. When using those documents, you will want to double-click to open them and save them without editing to your local drive so you can read them offline.

Navigating the SharePoint Training Sandbox

We've created a sandbox where you can safely work while in the Recruiter Academy Program.

Recruiter Academy Program Training Sandbox

Use this page to save files for the current Consumer Recruiting Team Recruiter Academy Training Program in the Cohort folder below. Please do not post any folders at this level. Embed them in the cohort shared documents folder.

Your Team:

- Mentor: Laura Starbird (FT)
- Recruiting Coordinator: Katie Hanley
- Program Manager for Learning: Lin Laurie
- Senior Program Manager: Leilani Lutali
- Project Manager: Ann Shaver

Getting Started

- Share this site
- Change site theme
- Set a site icon
- Customize the Quick Launch

Links You will need:

- Recruiter Academy Wiki
- Template Library

Shared Documents

Type	Name	Modified	Modified By
Folder	Spring 2017 Cohort	1/5/2017 6:04 PM	Laurie, Lin
Folder	Training and Documentation	1/14/2017 12:13 AM	Laurie, Lin

[Add document](#)

- Lists the team for the current RAP and their official positions.
- Provides links to other places that might contain information, templates, or other materials of use during the program.
- This section contains folders with different documents, spreadsheets, and other materials that can be accessed and used during the current program. Under the **2017** folder, you and your team will create folders for each event, and post information about the event in its specific folder.

Accessing the Recruiter Academy SharePoint Site

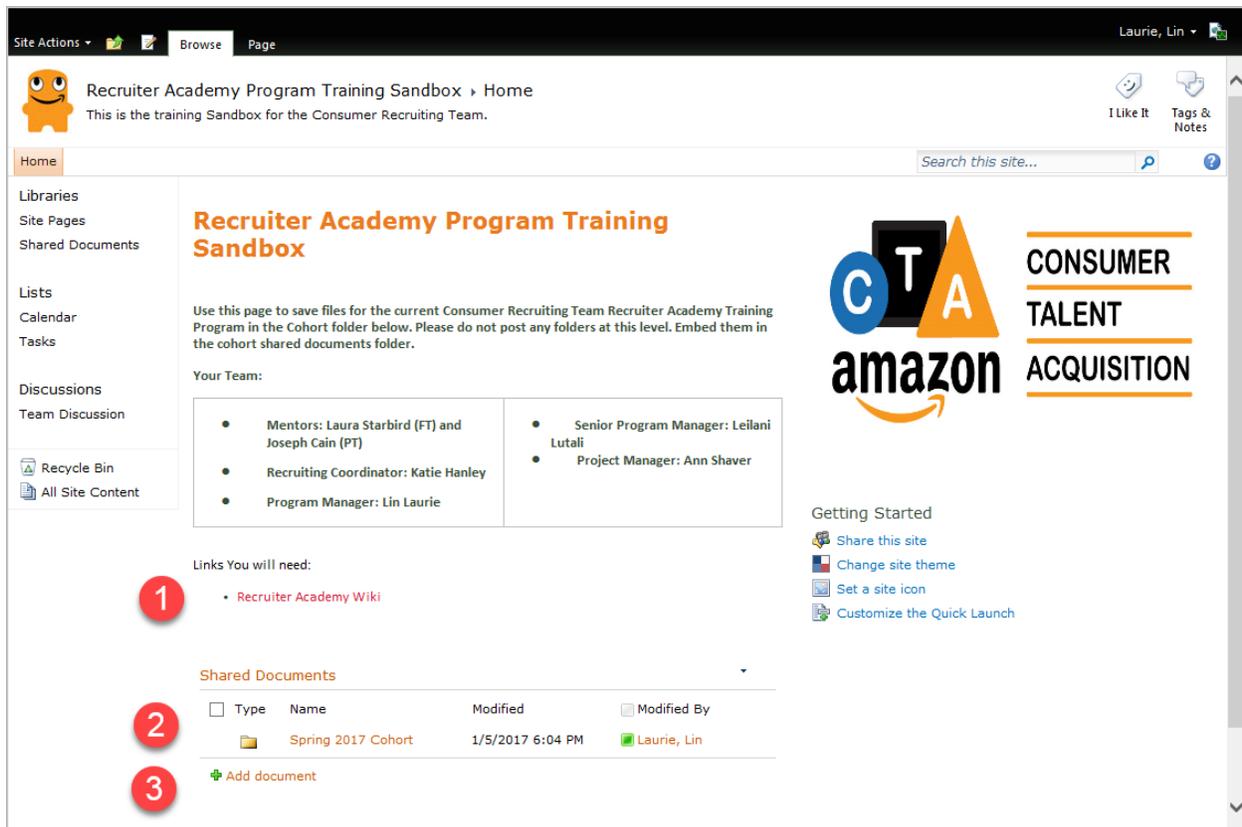
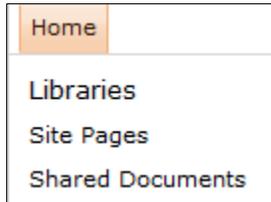
We'll use our SharePoint Sandbox for this example but we don't want everyone to click on it while it is being demonstrated.

- Click on a [SharePoint site](#) link to open a site that you have access to.

2. Click on the folder you want to open. (We'll use the current Cohort folder called **Spring 2017 Cohort**.)

Navigating a SharePoint Site

You can always use the navigation on the left side of each page to navigate to Shared Documents, or click the Home tab to return to the top-most page of the SharePoint site.

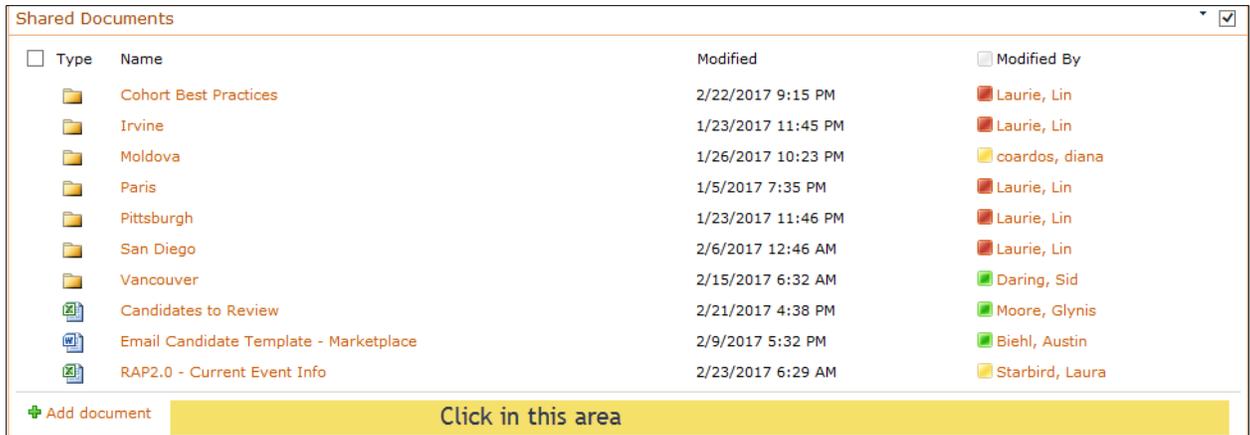
A screenshot of a SharePoint site titled 'Recruiter Academy Program Training Sandbox'. The page has a dark header with 'Site Actions', 'Browse', and 'Page' tabs. The main content area features a large orange title, a description, and a 'Your Team' section with two columns of team members. Below this is a 'Links You will need' section with a red circle '1' next to a link to 'Recruiter Academy Wiki'. A 'Shared Documents' section follows, with a red circle '2' next to a folder named 'Spring 2017 Cohort' and a red circle '3' next to an 'Add document' button. The right side of the page includes an Amazon logo with 'CTA' and 'CONSUMER TALENT ACQUISITION' text, and a 'Getting Started' section with links like 'Share this site' and 'Change site theme'. A left sidebar contains navigation options like 'Libraries', 'Site Pages', 'Shared Documents', 'Lists', 'Calendar', 'Tasks', 'Discussions', 'Team Discussion', 'Recycle Bin', and 'All Site Content'. The user 'Laurie, Lin' is logged in.

1. Click here to navigate to another site (the Recruiter Academy in this case).
2. Navigate to another folder level down from the current folder level.
3. Click Add document to browse and upload documents to the current folder.

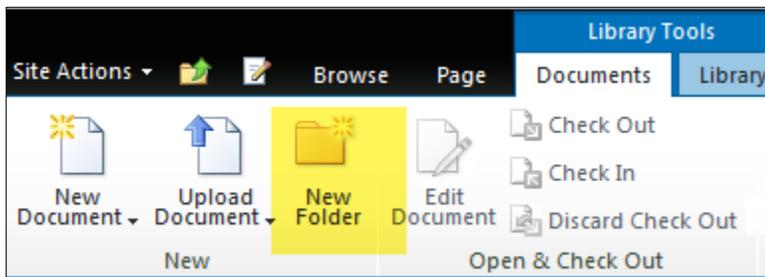
Creating New Folders

Please only do this in your Training Sandbox inside the Cohort folder.

1. Navigate to the folder where you want to create a new folder.
2. Click in the area at the bottom of the Shared Documents list but not on the Add document text.



3. Click on the Documents tab under Library Tools at the top of the page.

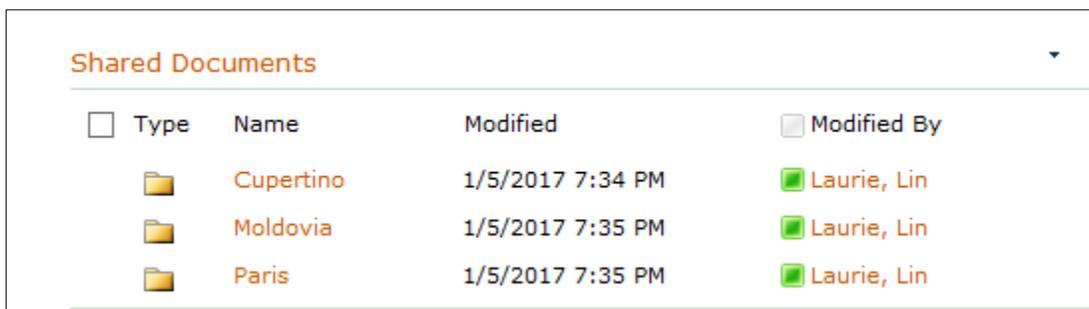


4. Click on New Folder.
5. Give the folder a name and click Save.

Adding Documents

Use this process to add documents in the current folder (we want you to only do this inside your Cohort folder).

1. Inside your cohort folder, select the event you've been assigned to source, and add your event documents in that folder.

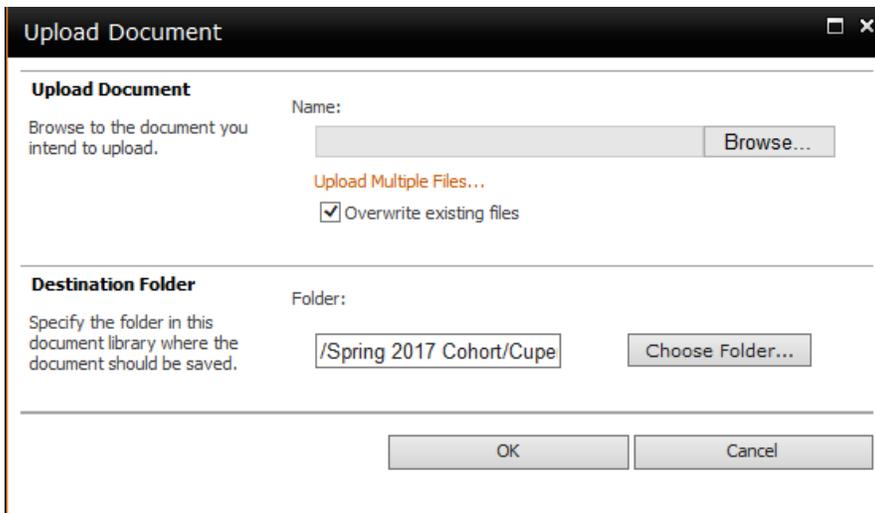


Note: These events will likely change prior to the start of class so create your own event folder structure.

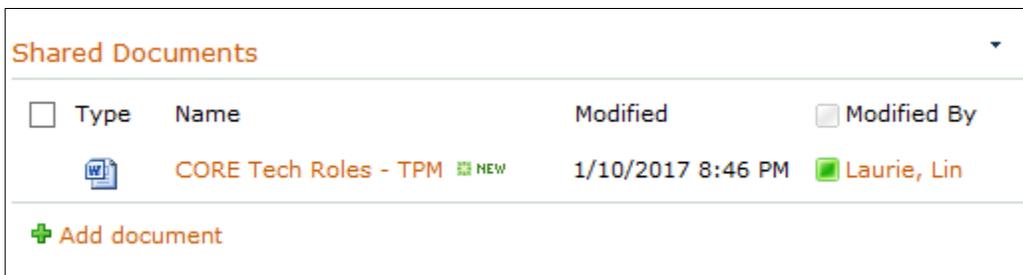
2. Once in the folder you want to add a document to, click the **Add Document** link.



3. Browse and select the document that you want to upload to the SharePoint, and click **OK**.

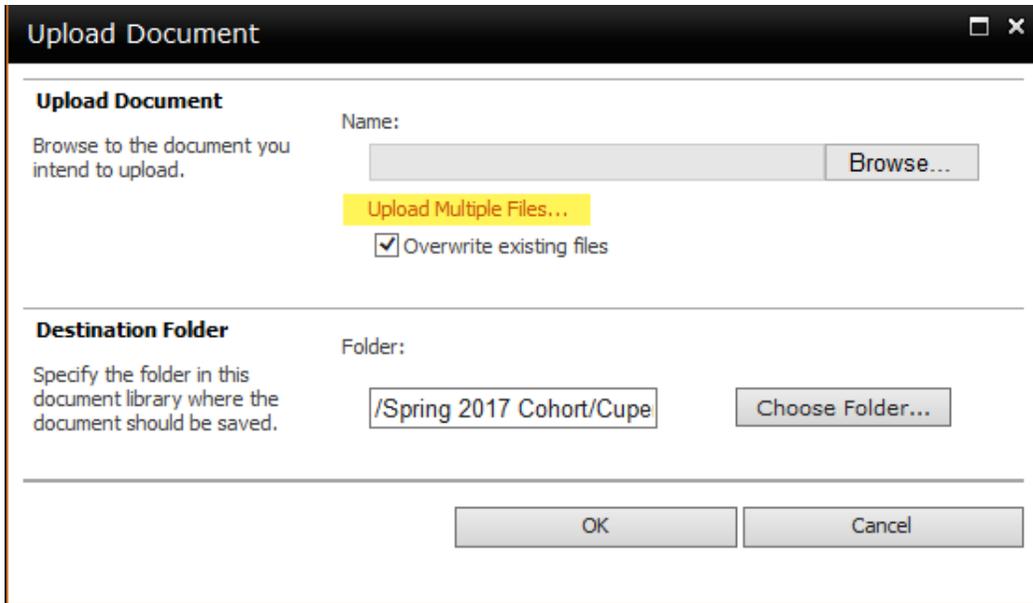


4. The file will be uploaded to the SharePoint with your name and the date it was added and it is now available for all others with access to the site to view, edit, or delete, according to their permissions.

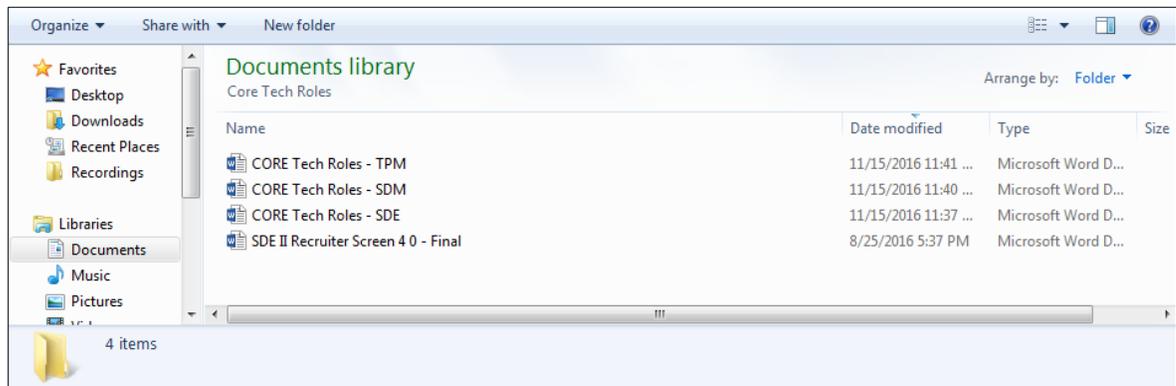


Adding Multiple Documents

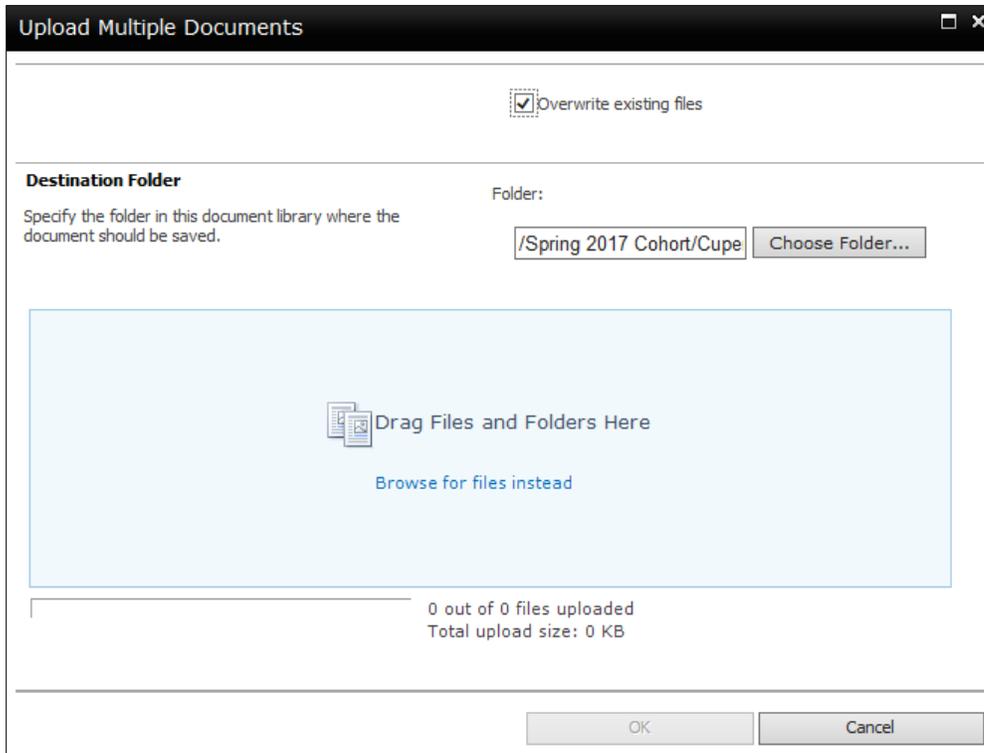
1. Follow the directions above to upload a single document, until you get to Step 6, and then select **Upload Multiple Files**.



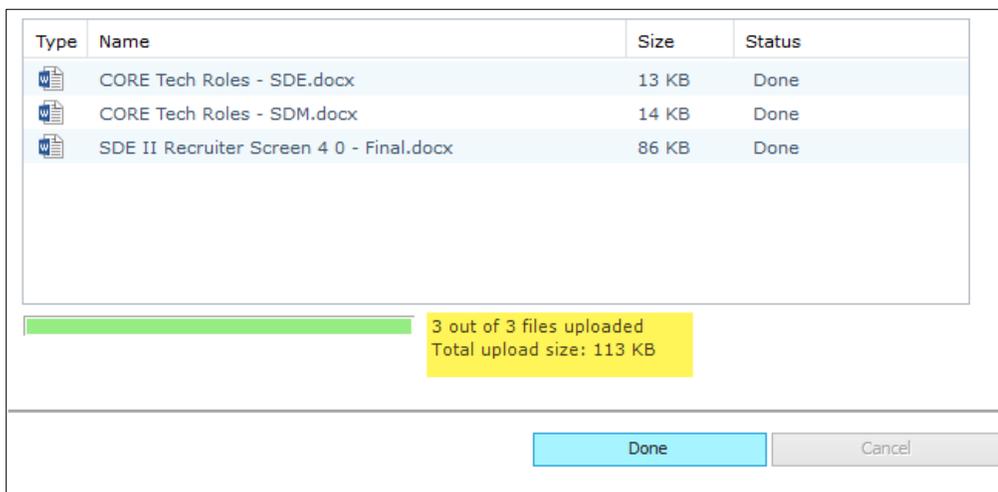
2. Open Windows Explorer to view the folders you want to upload.



3. Select all the documents you want to copy to the SharePoint site, and drag them to the blue section in the Destination Folder area.



4. Click **OK**, and watch the progress as the files are uploaded.



5. Verify that all the files were uploaded by reviewing the message that appears, and then click **Done** when the files are uploaded.

Checking Out a File to Edit

Please do not check out files that you won't be working in, like the training documents. You should open those as read-only and save them to your PC to read offline.

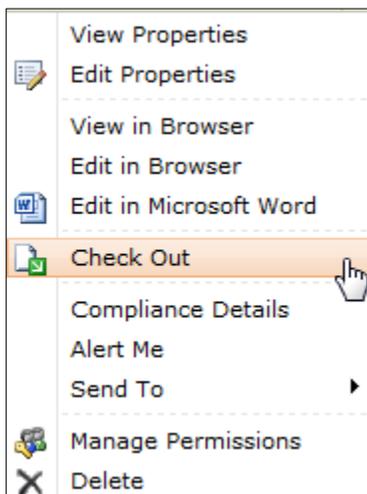
- **Please remember to check the file out and check it back in as soon as you've finished editing it!**

- **Only check out a file when you want to edit it. You don't want to check out a document if you are only reading it or if you want to save it to your personal computer, like when you open training documents, for example.**

1. Locate the document you want to open and hover over the area to the right of the title but before the Modified Date.



2. Select Check Out from the drop-down list.



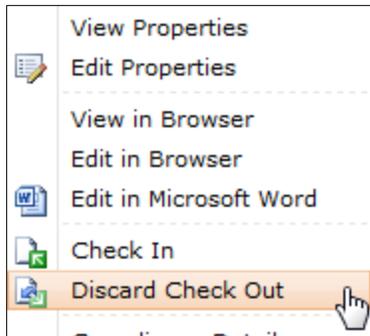
3. Repeat the steps to open the drop-down list and select Edit in Microsoft Word (or Excel). Whatever the original authoring tool is, that's what will appear as an editing option here.



Note: While you are working on the document, it will show in the SharePoint as a checked out document by displaying an icon with an arrow.

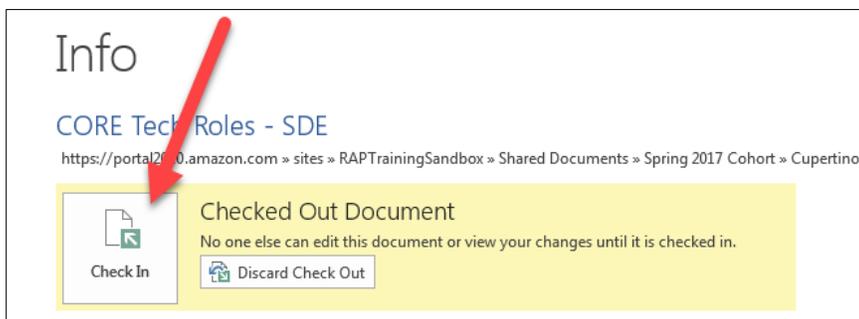
Checking a Document In

If you haven't made any changes to a checked out document, you can go up to the SharePoint site and click on the document, and then select Discard Check Out. This will return the document to its available state without making any changes to it.

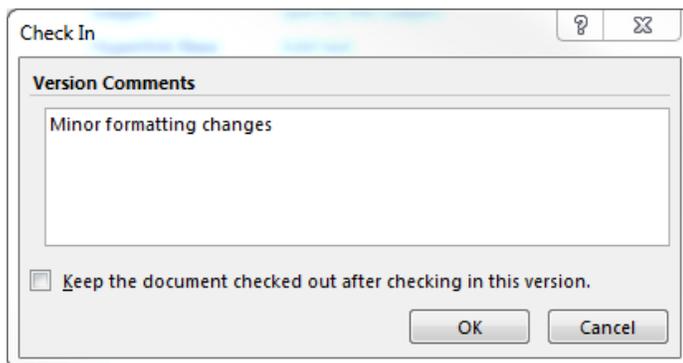


After you have made all the changes to the document you've checked out, you will want to immediately return it to the SharePoint so others can use it.

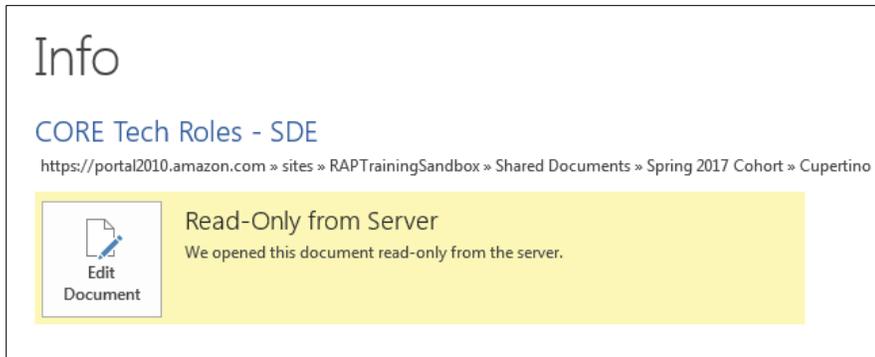
1. From inside your document, click on the File tab, to view the Info page.



2. Click Check In to return the document to the SharePoint so others can check it out.



3. Enter text describing what type of work you did to the document (for versioning control), and then click OK.
4. Notice that the document will remain open but the status of the document on the Info page changes to **Read-Only from Server**.



5. Close the document unless you want to save a copy to your local drive first, but knowing that if you do, you will be breaking the link to the SharePoint and your copy will not be connected to the check in/out process any longer.

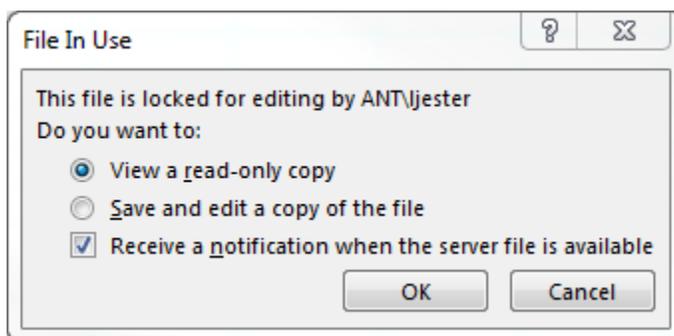
Troubleshooting Locked Documents

There will be times when someone walks away from a file without checking it back in. You might be tempted to just take a read-only copy and edit it off-line. However, if you do that, and later save it with the same name, the person who had it locked will have lost all their changes. So do not do edit a document that you have not checked out!

You should be able to tell at a glance that the document is checked out as an arrow should appear at the bottom of the icon for the file.



1. Open the document you want to edit.
2. When it opens in the browser, select Open in Word or Excel (or the native authoring tool).



You should receive an error indicating that the file is locked for editing and it should display the alias of the person who is currently working on the document.

3. You can select one of the following options:

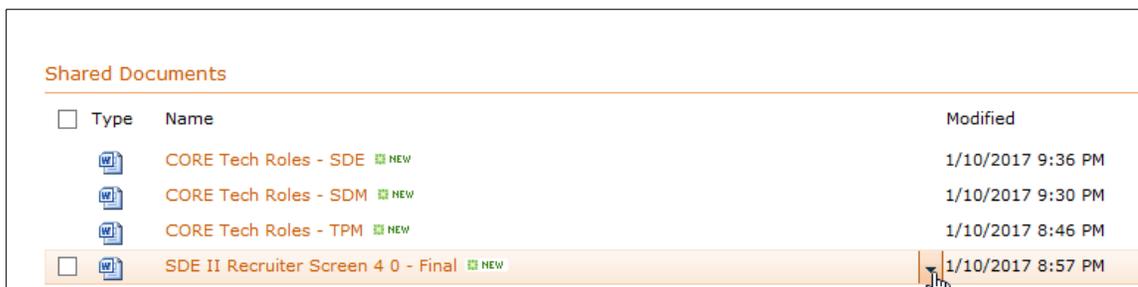
Option	Description
View a read-only copy	This option is great if you want to read the contents of the file but not edit it.
Save and edit a copy of the file	Not recommended as you could overwrite the other person's work if you check it back in or lose your own work.
Receive a notification when the server file is available.	If you can wait for the document to become available, select this option.
While this option isn't listed, you can send the person listed an email or walk over to their desk and ask them to release the document.	You can email, Skype, or phone them with a request.

4. Click OK to close the dialog box.

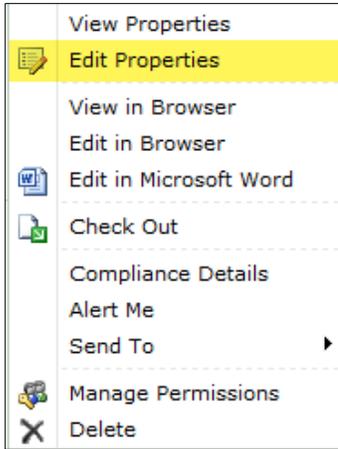
Renaming a Document or Folder

Sometimes you don't like the name of the document or folder and realize it after you upload the document to the SharePoint site or create the folder on the site. You can easily change the name of either a document or folder following the instructions below.

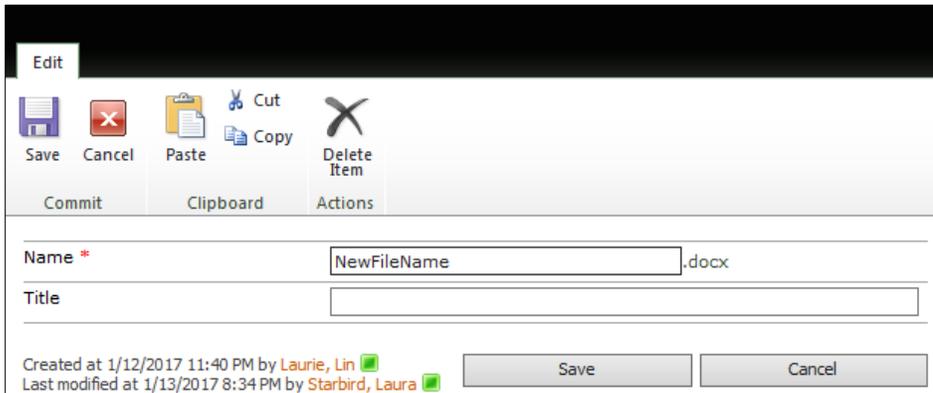
1. Hover your mouse over the file you want to rename.



2. Click the down arrow to display the menu, and select Edit Properties.



3. Change the name of the file and click Save.



Note: Don't change the Title because it doesn't appear on our list of documents.