Teacher SharePoint Training (Initial)

Key Concepts and Terminology
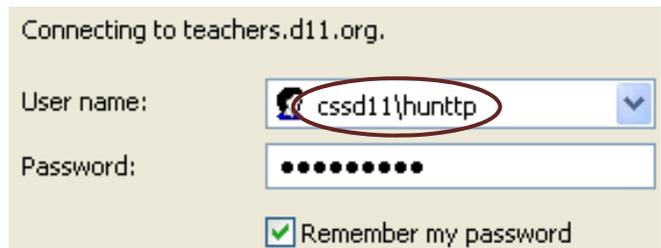
1. SharePoint Structure

```
                    ┌─────────────────────┐
                    │  Teacher Home Page  │
                    │   Site Collection   │
                    └─────────────────────┘
              ┌───────────────┴───────────────┐
       ┌─────────────┐                 ┌─────────────┐
       │   Class 1   │ . . . . . . . . │   Class 2   │
       │    Site     │                 │    Site     │
       └─────────────┘                 └─────────────┘
        ┌───────────┐                   ┌───────────┐
        │  Sub site │ . . . . . . . . . │  Sub site │
        └───────────┘                   └───────────┘
                       ┌─────────────┐
                       │  Libraries  │
                       └─────────────┘
                       ┌─────────────┐
                       │    Lists    │
                       └─────────────┘
```
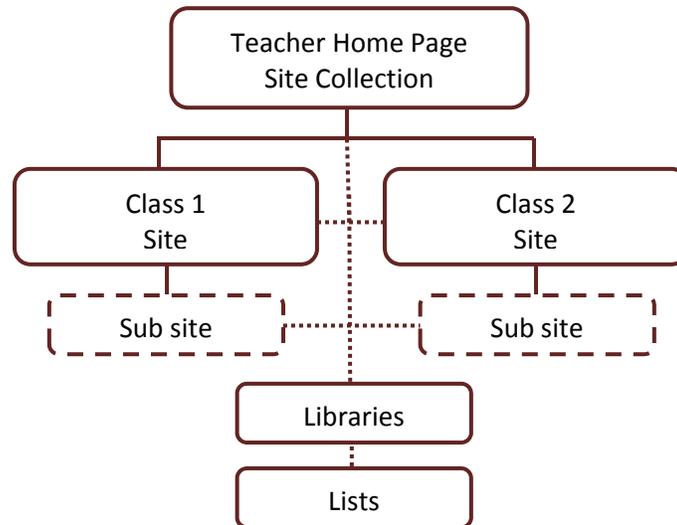
2. Libraries – Used to store documents of all types: Word, Excel, videos, images, etc.; includes materials viewable by the public, resources internal to District 11, and personal documents.
3. Lists – Hold specific types of information (e.g., discussions, announcements, calendars, links).
4. Quick Launch Bar – Contains commonly used links, lists, and libraries on the far left side of web page. We have preconfigured these based on teacher input, but you can add or hide items.
5. Web parts – Think of these as widgets configured with specific functionality (e.g., Teacher Tools links, media web parts for streaming videos).
6. Publishing vs. collaboration sites – Collaboration sites are collections of web parts; publishing sites resemble typical web sites. Although both look like typical web pages, the manner in which you add content and edit these sites differs slightly.
7. Permissions and security – SharePoint gives you total control over who sees what on your sites. We have taken teacher input and carefully designed your sites so that only those that need to can access the various items (list and libraries) on your sites. *CAUTION: As site owners, you have full control over permissions – this is a double edge sword that can be very powerful … or do great damage. You are strongly advised not to adjust permissions. Consult school/district SharePoint support personnel before making any permission changes*.
   a. Site Owner – Teachers have full control over their site (home page, class sites, libraries, lists, …)
   b. Site Students (e.g., Class 1 Students) – Student membership to your site is based upon Zangle enrollment/scheduling; student permissions vary (see last page).
   c. Site Visitors – Site members with view only permissions; initially, this group has no membership.
   d. Anonymous access – Only your teacher home page is set up for anonymous (public) access.
8. Default permissions – See the last page for detail regarding site, library, and list permissions.
9. Optimizing SharePoint – SharePoint is a Microsoft product that is essentially free with our district licensing. As such, SharePoint is most compatible with Internet Explorer (versions 7 and above). You can use other browsers such as Firefox and Safari, but you will lose some key functionality. Additionally, ensure that you allow Active X controls on your SharePoint site and enable a free browser add-on called Silverlight. Windows Media files are the video format of choice as they can easily be added and streamed from within SharePoint.

Accessing Your Site

1. Your individual teacher homepage has a unique URL. Enter the following in the browser address bar to go directly to your homepage where "*lnamefm*" is your network ID (the username you use to login to your D11 workstation): **http://teachers.d11.org/teachers/lnamefm**.

2. Your teacher homepage is accessible by anyone (called anonymous access), so parents (anyone really) can access your teacher homepage to learn about you, your instruction, etc. Individual class sites, however, are permissioned so that only your students can access them. *Please, do not modify these security settings as they have been set to safeguard the activities and information exchanged between you and your students!*

3. You will have to authenticate before accessing your site. This requires entering your district network username (*lnamefm*) and password. You will also have to include your network domain prefixing your username. The domain is typically **cssd11** for employees, **instruction** for elementary school students, or **instructsec** for secondary students. Note the *backslash* ("****" not "/") between the domain and the username.


4. Students use the same URL to access your SharePoint site. They will login with their network username and password, prefaced with the domain **instructsec**. Example: *instructsec\doejj1234*. After they login, your students will have access to the class site(s) in which they are enrolled.

5. To logout click the link at the top right corner of the page (it tells you who is logged in), then pick "Sign Out" in the dropdown. Note: you have to close the browser to completely logout.

6. Note: You and your students have anywhere, anytime access to your SharePoint site. Logging in from home (any place with an Internet connection) gives you and your students access to all site features and functions.

7. PERMISSIONS/SECURITY WARNING: Although you are the owner of your SharePoint teacher site, your site has a service account, typically named *SVC_SPInstall* or something similar. The service account is set up for your protection and safety. **Do not under any circumstances remove or alter permissions for the service account(s).** If anything should happen to your site (for instance, you accidentally remove yourself as owner) or your site is victimized by a hacker, the service account owner can usually restore your site. If the service account is altered or missing, damage to your site may be irreversible. Additionally your site may not receive enhancements and updates if the service account is altered.
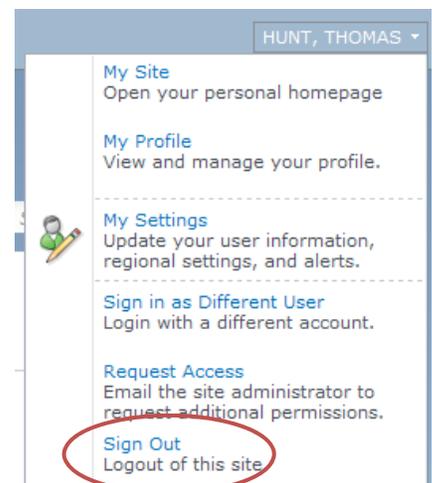
Navigation

1. Navigation within SharePoint is typically very intuitive: clicking a link, a library, etc., takes you to that location on your SharePoint site, an external web page, etc.

2. The left frame of the page houses the **quick launch bar** that has many of the key links (e.g., Discussions, Calendar, Drop Box) – just click and go.

3. SharePoint uses **breadcrumbs** to facilitate navigation. The **Navigate Up breadcrumbs** show links that not only tell you where you are but also help you get to where you want to go quickly. When the **Navigate Up** icon at the top left of the screen is clicked, it will show you a tree view of your SharePoint whereabouts. Click any of the links on the tree to get to that location.
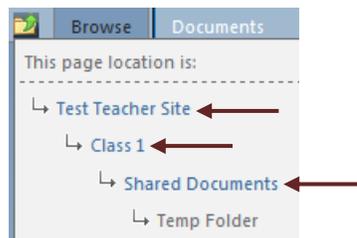
4. There is also a **horizontal breadcrumb bar** to help you navigate and, in some cases, access list settings:

5. To return to the teacher homepage, users can also click on the Colorado Springs School District 11 logo or text.

6. *Note: The back arrow oftentimes works to take you back page by page. In some cases, however, it will not work cleanly and may require a screen refresh (click the refresh icon or F5). Remember, however, the breadcrumb navigation feature of SharePoint is the cleanest way to navigate.*

7. The **Site Actions** tab is another way to quickly access libraries or other key locations/key functions of your SharePoint site. The **Site Actions** tab helps you jump quickly to a given location on your SharePoint site, but it does much more.
   a. Go to specific content on your site, e.g., libraries, lists, discussion boards, etc., via the "View All Site Content" link:
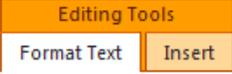

   b. Create new pages and/or sub sites (more on this later)
   c. Add features/functionality to your site (more on this later)
   d. Setup and configure your site (more on this later)
   e. View and edit user permissions (more on this later)

8. "Browse" tab : This takes you to the normal display mode, i.e., browsing as in a web page.

Editing Your Site

1. "Edit" button [icon] (Note: If this icon is not visible, click on **Site Actions** then "Edit Page")
   - Use this to edit various items within your SharePoint site. It opens the editing version of the ribbon, which is used to edit content on your site.

[toolbar ribbon image]
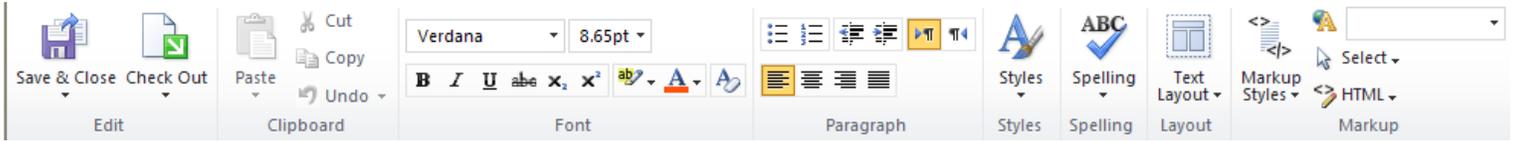
2. There are also some "Editing Tools" available [Editing Tools / Format Text / Insert]
   a. The "Format Text" tab functions much like the formatting tool bar in Word.
   b. The "Insert" tab gives the ability to add content/functionality to your site (more on this later).

[insert ribbon image]
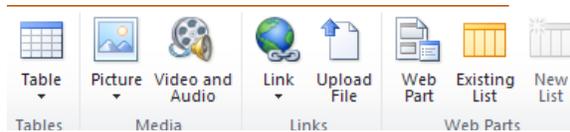
3. Important notes on editing your SharePoint site:
   a. Teacher Home Page – *IMPORTANT: Since this is a publishing site, you must click "Publish" for others to view your changes. Although you can see unpublished changes, others can only see changes after you have published them.*
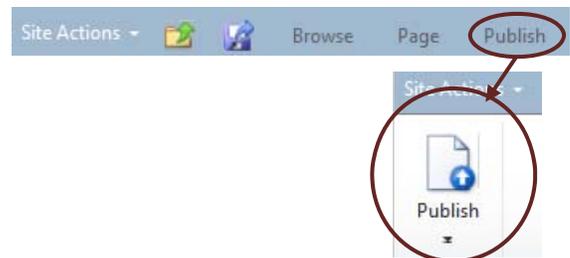
   b. Class Sites – These are collaboration pages that do NOT have to be published. You will primarily add/edit content on these pages via web parts. For instance, upon editing a class page, you will see the "Add a Web Part" option. You can click on this to add web parts (more on this later). When done editing, click [Stop Editing], which appears at the top left below **Site Actions**.
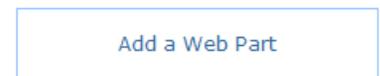
   c. Web parts – Whether on your home page or on a class page, you can add or edit web parts. To edit web part properties, click the down arrow on the top right corner of the web part, then click "Edit Web Part."
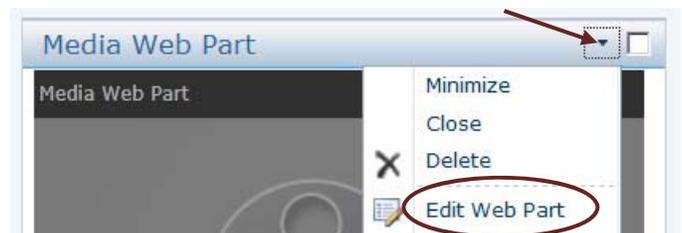
   d. Save, Check Out / Check In, and Publish – You can (and should) use the save icon to frequently backup your work. SharePoint also has a "Check Out" / "Check In" functionality. This is handy when your site has two or more owners (e.g., co-teachers). Once checked out, no one else can edit it, so make sure you check in back in. As described above, publishing your site is necessary when you want others to see your home page. Publishing also saves and checks in your site. *Remember; publish your teacher home page after making changes!*

Setting Up Your Site

1. Personalizing Your Home Page
   a. Spend a few minutes customizing your teacher home page. For instance, replace the "Welcome to …" and the text below it with some relevant info about you and your classes.
   b. Click **Site Actions** then "Edit Page" or click the edit icon 📝 if it's visible.
   c. Add your name and other info about you and your instruction.
   d. You can use the SharePoint ribbon to change fonts, sizes, colors, etc.
   e. When done, make sure you save your work by clicking the "Publish" button (see above).

2. Uploading Documents and Creating Folders
   a. Uploading documents if fairly simple and intuitive.
   b. Click on "Shared Documents" and create a new folder by clicking on "Documents" then "New Folder."
   c. Give the folder a name and save it.
   d. You have two choices at this point to add documents. You can click on the "Add document" link in the folder you just created. Or, you can click the "Documents" tab in the ribbon bar. Note that you the option of uploading multiple documents (use Internet Explorer with Silverlight installed).
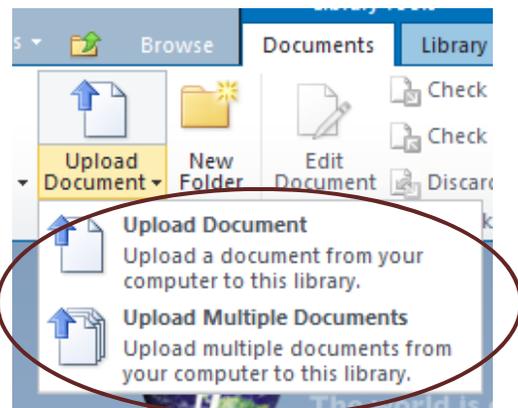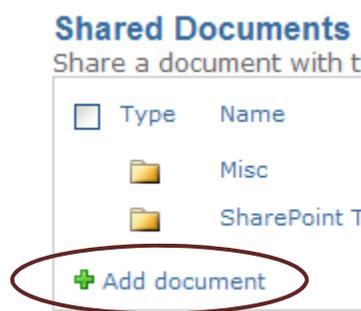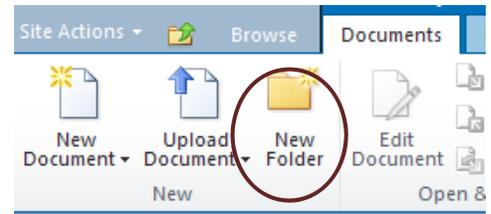
3. Adding a Picture to the Teacher Home Page
   a. First, make sure you're in the edit mode (the edit button 📝 or use **Site Actions** → "Edit Page").
   b. Click in the picture area, above the "Image Caption" so that you see the square frame selector icons on all sides/corners of the image place holder.
   c. Click "Insert" above the ribbon bar then "Picture" on the ribbon bar then find a picture you want to upload on your local workstation or one stored in a SharePoint library. Follow the prompts to upload a picture into SharePoint.
   d. Save and display your changes by publishing your page.
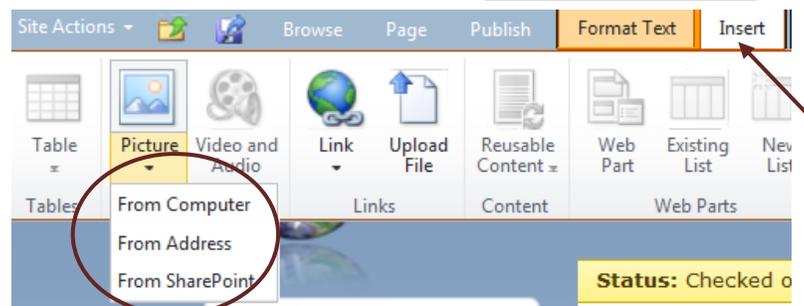
Customizing Your Site – Media Web Part

1. Web parts are much like widgets and smart phone apps – they are specialized add-ons with specific functionality. They greatly enhance the capabilities of your site.

2. Accessing web parts is done by clicking the edit icon [icon] (or **Site Actions** → "Edit Page"), then "Insert" on the ribbon bar, then "Web Part."
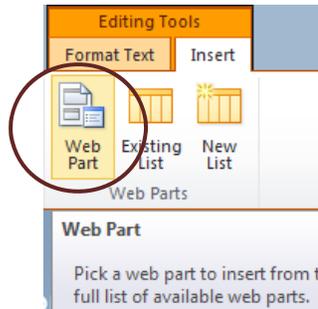
3. The web parts are arranged by categories to help you sort through the many options. As an example, select the "Media Web Part" from the "Media and Content" category to insert a video.

4. At this point, it's a good idea to know where a video is located on your hard drive or, better yet, have it already upload to your SharePoint site.

5. Before adding the web part, make sure you place the cursor in the main content area where you want the media to appear. For instance, you may want to add it before "Announcements" on your home page; place the cursor at the appropriate location.

6. Click the "Add" button (far right).

7. This will create a web part window ready to insert a video. Use the "Click here to configure" option in the web part image to upload the media file, change the title, configure its dimensions, set it to auto play, etc.

8. Note: For common web parts there may be a shortcut already created on the ribbon. For instance, the media web part can be added in fewer clicks by clicking "Edit page" → "Insert" → "Video and Audio."
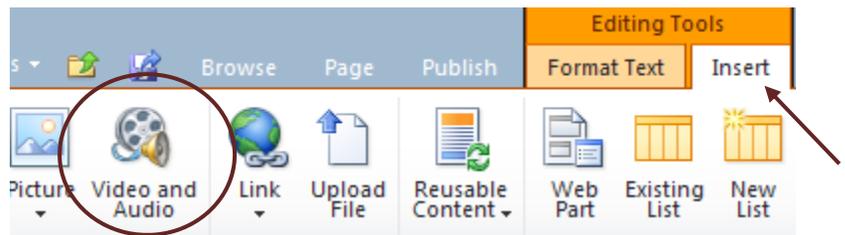
9. *Note on video upload size: The maximum file size for each video is 50 MB, but we recommend much less per video upload. We have not established a cap on the max size for individual teacher sites at this time.*

10. *Note on video formats: Not all video formats will play within SharePoint. Windows media (.wmv) and mpeg (e.g., mp4) formats play within SharePoint, but streaming others within SharePoint may require special coding. It is possible to add a link to your site that will play other formats, but these may not stream within your SharePoint site without advanced configuration changes.*

11. Deleting web parts is easy (maybe too easy, so be careful). Once in edit mode, highlight the web part and press the "Delete" key or click on the top right dropdown arrow of the webpart and select "Delete."

Customizing Your Class Sites – Content Editor

1. The "Content Editor" is a web part that allows you to enter rich text along with HTML formatting and functionality. For instance, you could copy/paste content from an existing web site and SharePoint will, for the most part, retain all the formatting … some formatting may be required, but SharePoint does most of that behind the scenes. If you're well versed in HTML, you can enter HTML code directly into the content editor.

2. The content editor is accessed much like the media web part above. Go to one of your class sites then enter into the edit mode, then insert a web part, then select "Media and Content" then select "Content Editor."

3. Before hitting "Add," make sure the cursor is exactly where you want the content editor window to appear.

4. Clicking on "Edit Web Part" then on "Click here to add content" will allow you to enter new content.
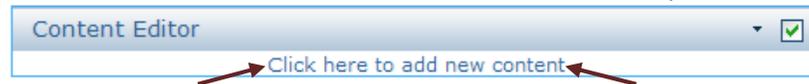
5. Adding content from existing sources:

    a. Typically copy/paste works well (via the right click menus or via control-c/control-v). Some formatting may have to be tweaked. If the item you're copying has links to other sources, those links will follow. Be watchful, however, for links to items on your local computer or some web sites: make sure other users have access to these sources otherwise the links won't work. When in doubt, upload documents, videos, etc., to your SharePoint site, and then link the content editor to your SharePoint libraries rather than external sources.

    b. **Advanced Users Only:** If you want to add HTML code directly to the content editor window, you first have to click on "Format Text" in the ribbon bar "Editing Tools" then select "HTML," then select "Edit HTML Source."
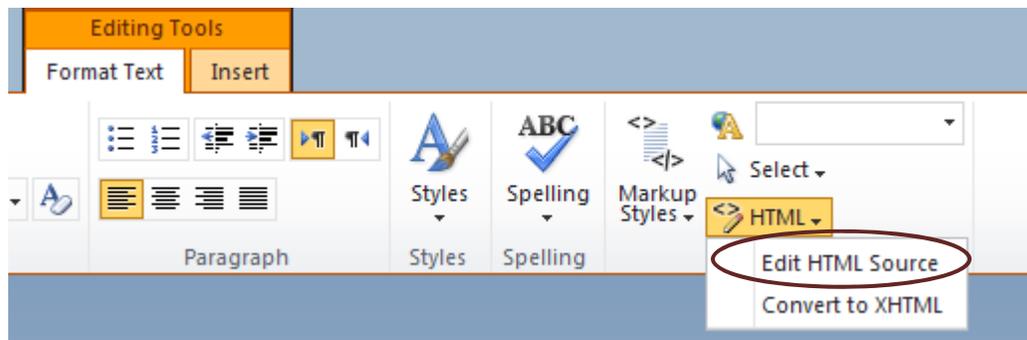

6. The content editor properties window on the right frame allows you to adjust many settings: change the title, move the web part on the page, etc.

7. *Note: Be mindful, once again, of the content editor's width. Significantly exceeding a width of the teacher page work area may cause the content to be unreadable. This is especially important when copying material from another web page to your SharePoint site.*

Calendar Notes:

The Calendar has two custom fields (called columns in SharePoint):

- **Teacher Resources** is a field used to add links to web resources (go to "Insert" → "Link" on the ribbon, then type in a URL such as http://www.google.com).
- The **Linked File** field allows you to attach documents stored on your SharePoint site. Although you can attach documents stored locally using the "Upload File" feature on the ribbon, using the "Linked File" option allows you to add documents stored on your SharePoint site; see the screenshots to the right.
- To add items to your calendar, double click on the day then click on "Events" then "Add D11 Event."
- Although you can specify start and end times, you have the option to select an all-day event … or even set the event to span several days (just as in Outlook).
- Note: Calendar entries made on the teacher home page calendar also flow to the individual class calendars. This default setting allows you to make one entry rather than having to make multiple entries on each class calendar. Entries made on class calendars, however, do not flow to the home page calendar.
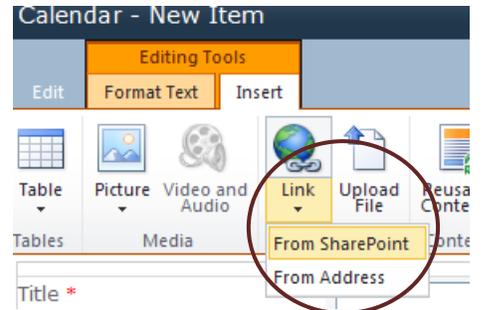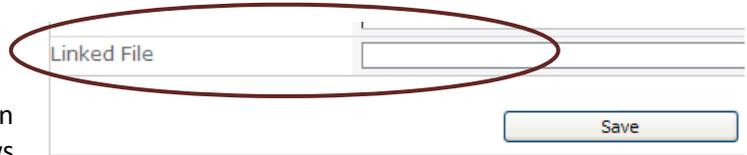
Assignment Notes:

Teachers can add assignments to the classroom pages and/or calendars by using the **Assignments** feature.
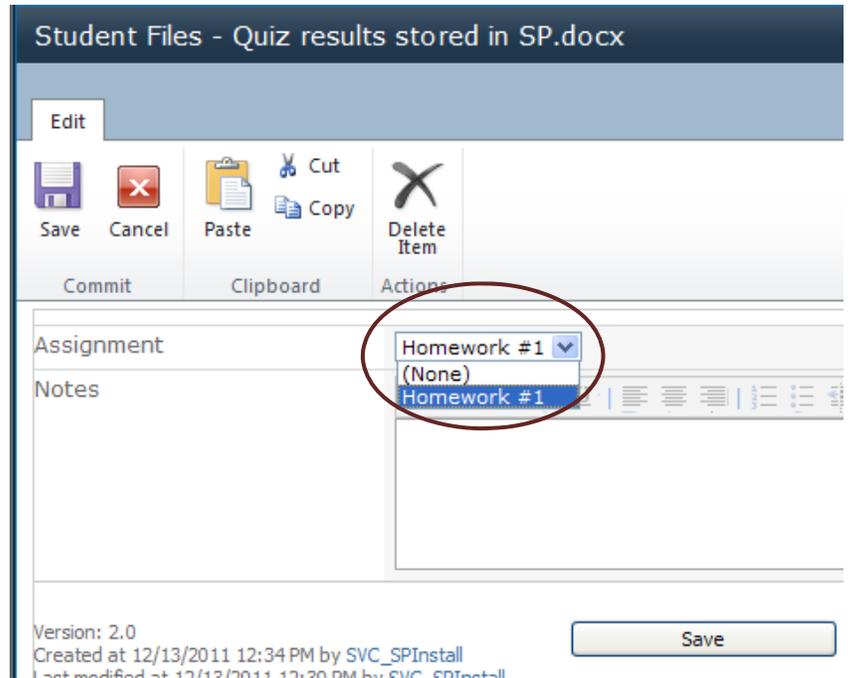
- This feature behaves much like the calendar entry above (even has teacher resources and linked files options), but you need to specify the assignment type – several default values are preloaded or you can create your own assignment type.
- You also have the option to automatically add assignments to the classroom calendars – click the "Add to Calendar**"** box.
- When using the **Drop box**, students must assign the document to one of the assignments you create.
- Note: Students have several places in which they can grab resources, homework, worksheets, etc., depending on your preferences: the **Assignments** tab, the **Calendar** if you send assignments to the **Calendar**, or **Shared Documents** (actually, any shared document library).
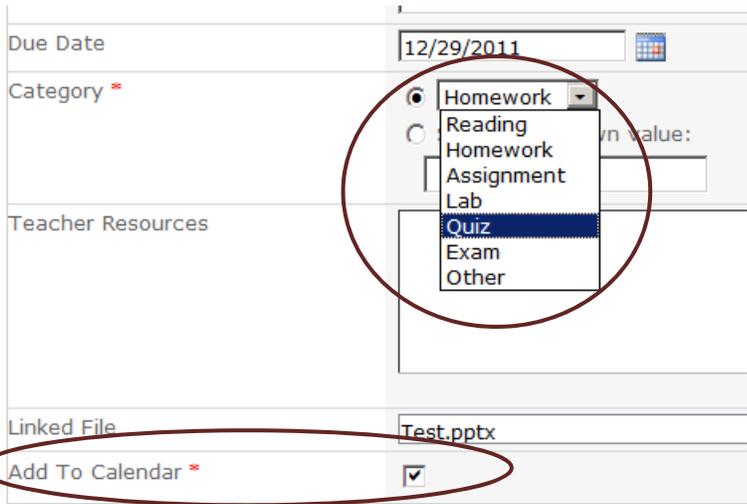
Drop box Notes:

Students can use the drop box to send you electronic documents (e.g., homework).

- Typically a student will go to your Class **Calendar** or **Assignments** tab to retrieve assignment information such as a writing assignment or worksheet.
- The student completes the assignment and uses the **Drop box** to submit it to you.
- Upon uploading a document to the **Drop box**, a second dialogue box will open prompting the student to associate the document with a specific assignment that you have previously set up.
- You can see all submitted assignments by going to the **Assignments** tab or directly to the **Drop box** (also called **Student Files**).
- Note: you can sort assignments and drop box ("Student Files") items by document name, date, etc. – just click the drop down arrow in the heading and select your sort options.
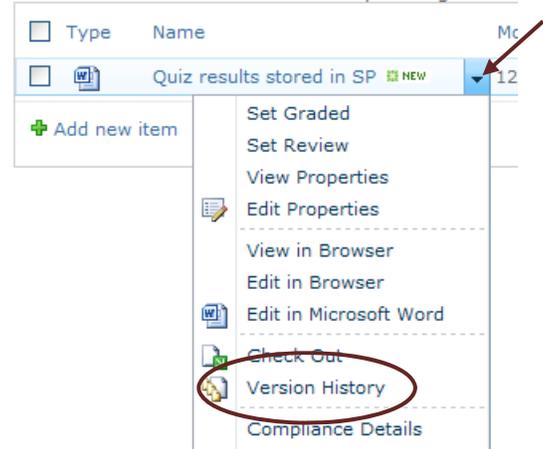
	Type	Name	Modified		Modified By	Assignment	Status
☐		test	1/3/2012 2:24 PM		HUNT, THOMAS	homework	
		test	1/3/2012 11:06 AM		SPStudent1	homework	Submitted

Student Files ‣ All Documents ▾
Share a document with the team by adding it to this document library.

- If the student submission is a Word, Excel, or PowerPoint document, you can open and even edit it within SharePoint (uses Microsoft Office Web Apps). Your edits can be saved with relevant notes to the student to review, rework, and resubmit the assignment as appropriate.
- SharePoint "remembers" all edits by you and your students (these are tracked as different versions). You can view previous versions by going to "Version History" when opening the dropdown menu to the right of the document name.

Discussion Tool Notes:

The Discussion tool is a custom web part developed by a third party specifically for District 11. It offers the following unique features:

- Threaded discussion items – expandable/collapsible tree-like discussion view for ease of viewing.

- Hovering preview – placing the cursor over a post shows a summary of the post along with information about who submitted the post.

- Specific permissions – permissions are set so that site owners (teachers) have full control over all posts; students can view all posts but only edit, modify, and delete their own posts.

- Alert functionality – A summary of discussion board activity is sent to your D11 email daily.

- Reporting of potentially abusive/inappropriate posts – it's easy for students (or you) to flag potentially abusive or inappropriate posts. You will get an email (either a daily summary or an immediate email notification depending on how you want it set up) with details about the post and a quick link to the post.


Discussions ▸ Subject ▾

Use the Team Discussion list to hold newsgroup-style discussions on topics relevant to your team.

Subject	Created By	Last Updated	Actions
⊙ First item (7)	HUNT, THOMAS	1/10 7:29 AM	💬 💬 📢 🛑

Reply button · *Alert Customization* · *View/edit button* · *Report abusive/inappropriate posts*

Blog Notes:

Your site does not come with Blogs pages setup, but it's fairly easy to do. Follow these steps:

1. Go to the page on which you want the Blog to appear; for example, a class site.
2. Click on **Site Actions** then "More Options …"
3. Click on the "Blog" icon; give it a name and a URL name in the right panel; click "Create." *Note: URL names can NOT contain spaces. Remove spaces or replace with underscores or dashes. Example: Use "my_blog" rather than "my blog" in the URL field.*
4. To get your blog link to appear on the quick launch bar, use the following path:
   a. **Site Actions** → "Site Settings" → "Navigation" (under the "Look and Feel" heading).
   b. Under "Current Navigation" click "Add Link."
   c. After giving it a title, click "Browse" – this will take you to your site content where you will find the blog you just created; click on it then on "OK."
   d. Move the blog link by using the "Move Up" / "Move Down" options.
5. Customizing your blog is done via the settings of the blog list. (List settings are typically found at the far right side of the SharePoint ribbon.) You can setup categories, notifications (alerts), etc. Although it is not possible at this time to embed videos in blogs, links to videos can be placed anywhere in the blog.
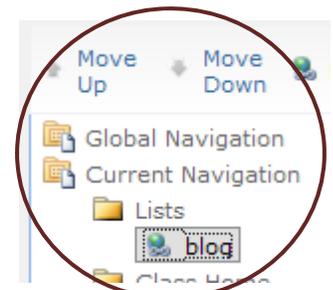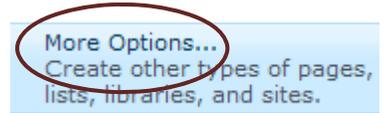
Advanced Feature – Adding a Personal Documents Library

1. You can easily add content including a personal document library to your SharePoint site. To do so, start by clicking **Site Actions** then "New Document Library."
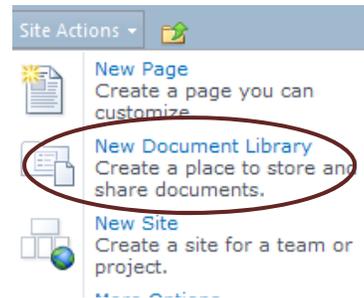
2. A dialog box will appear below with several options. Select the options as they appear on the screenshot to the right, then click on "Create" at the bottom of the dialog box. (Note: do not select a document template.)

3. If you want this new document library to be "hidden" from other users, there are a few more steps. First, click the "Library Permissions" link at the top right.

    (Note: You may only see the small icon depending on your screen resolution.)
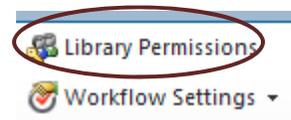
4. Click on "Stop Inheriting Permissions" at the top left and select "OK" in the dialog box.

5. The list that follows has all the site membership groups. We'll give you more training later on setting advanced permissions, but for now we're only concerned about three groups: teacher site owners (you), teacher site students, and teacher site visitors. Click ONLY the boxes to the left of "Viewers" and "… Site Students" and "… Site Visitors." **Caution: Do NOT select "…. Site Owners" or "System Account" – so doing will remove your own access, which may be irreversible!** At the very top, select "Remove User Permissions" then click OK.

6. The last step is to remove anonymous access if this library resides on your teacher home page. (This does not apply to libraries created on class pages since they are not setup for anonymous access.) Click on "Anonymous Access" on the ribbon, then deselect (uncheck) the option to "View Items." Click "OK."
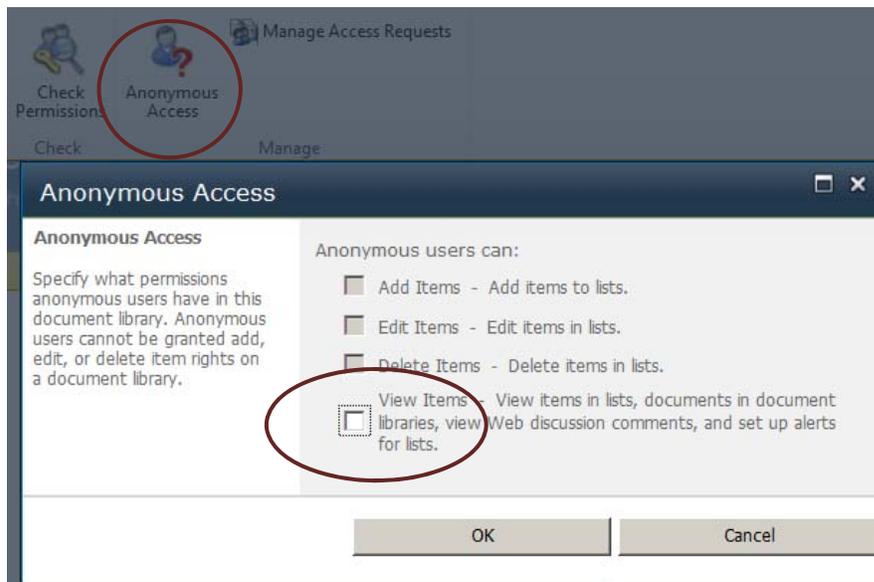

7. You now have a personal documents folder that is not assessable by students or parents – they won't even see the "Personal Files" link on the quick launch bar. If desired, you can reposition the quick launch link for this library. Go to **Site Actions**, then "Navigation" (under the "Look and Feel" heading). Navigate to "Current Navigation" then move the link to the library up or down as desired.
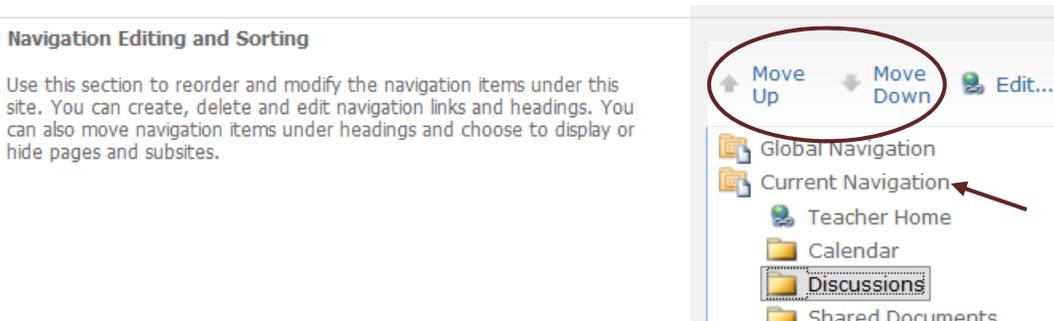
Advanced Features – Permissions and Security Settings

1. SharePoint manages security and permissions for each site via group settings. The groups range from system administrators who have full control to visitors who have read only access.

2. Changing document permissions – This is typically done by displaying a folder or document (but not opening it). Clicking the dropdown box to the right of the item brings up a menu that has the option to "Manage Permissions." We will give you more guidance on fine tuning permissions in the future. For now, *it is recommended that you consult district or building SharePoint support before adjusting permissions.*
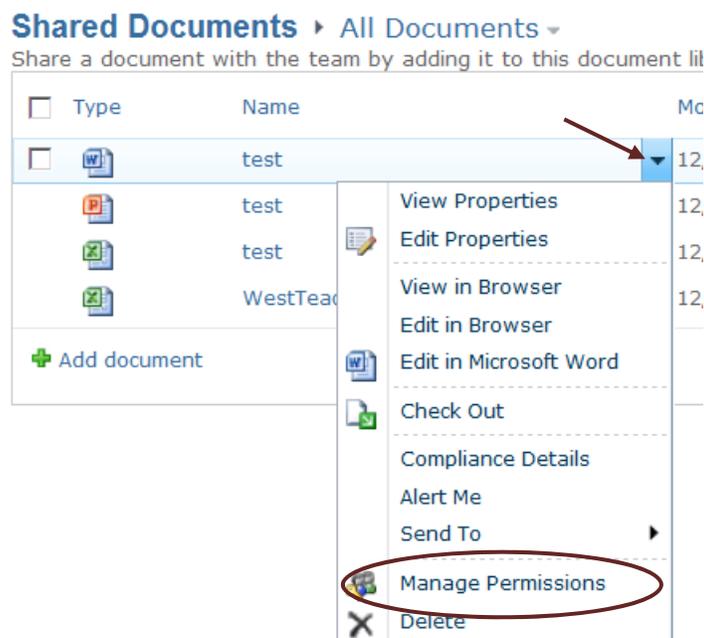
Advanced Features – Alerts, Views, Surveys

1. You can make changes to alerts (e.g., email messages). These may be covered in a subsequent training. For now, please use default settings.

2. SharePoint also allows you to customize the views of lists and libraries. For instance, you can configure the view of documents to include file size, create date, etc. This is another topic for follow-on training.

3. SharePoint has a built in survey tool. It can be leveraged to give simple quizzes. Feel free to explore this now if you'd like, but we will cover it more thoroughly in later trainings. Just to get your started:
   a. Clicking on "Surveys" takes you to a list of all the surveys you've created.
   b. Click the "Create" button to add an assessment – you'll have to select "Survey" once again, but this time it will be filed in the "Surveys" category in the left panel when you're done creating it.
   c. To modify or delete an assessment, click on the assessment, then "Settings."
   d. *You may have to configure security/permissions for the survery – consult your building or district SharePoint support staff*.
   e. There are many options for types of responses and you can even configure the work flow when a student selects a correct or incorrect answer.

Default SharePoint Teacher Site Functionality and Permissions

Quick Launch Item	Functionality	Home Page	Class Sites
Calendar[1]	Functions very much like an Outlook calendar in which you can add links to web pages, add documents, place assignments for students, add lesson plans, etc.	Viewable by all; editable by site owner (teacher)	Viewable by class membership; editable by site owner; class calendars inherit entries made on home page calendar
Discussions	Forum tools for group discussions; this is a customized web part unique to D11 that offers tree-like, expandable, threaded discussion boards; daily summary emails are sent to your email account; students can flag potentially abusive or inappropriate posts for your action	Discussions are not active on teacher home page	Students can view all posts and add their own posts but can only modify or delete their posts; teachers have full control over all posts on their sites
Shared Documents	Shared library for Word, Excel, etc., documents (Note: Word, Excel, and PowerPoint documents can usually be opened and edited within SharePoint via Microsoft Office Web Apps)	Viewable by public; teachers have full control	Viewable by student members only; teachers have full control
Pictures	Shared library for pictures and images (Note: SharePoint does not contain an image editor)	Viewable by public; teachers have full control	Viewable by student members; teachers have full control
Videos	Shared library for videos (Note: SharePoint innately supports Windows Media files but does not support others such as flash and avi)	Viewable by public; teachers have full control	Viewable by student members; teachers have full control
Wiki	Used to share knowledge, brainstorm, collaborate, etc.	Viewable by public; teachers have full control	Viewable by student members; teachers have full control
Surveys	Used to generate simple M/C, T/F, short answer, etc., surveys or tests (Note: does not automatically grade answers, but does generate reports in SharePoint; results can also be exported to Excel)	Not viewable by default – requires some setup; teachers have full control	Not viewable by default – requires some setup; teachers have full control
Class sites	Class site membership reflects Zangle scheduling information and is updated nightly	N/A	Students can access only class sites in which they are enrolled
Assignments[2]	Used by teacher to create assignments complete with web links, attachments, etc.; used by students to view and download instructional materials	N/A	Students can only view and download materials; teachers have full control
Drop Box[3]	Also called "Student Files" it contains all student submitted documents, teacher edited/resubmitted documents, resubmissions by students …	N/A	Students have access to documents that only they have submitted – they cannot see the work of other students
Blogs	Used to share information, videos, pictures, links, etc., while giving users the ability to comment, reply, and share their thoughts	N/A	Can easily be added and configured so others can access