CDISC

SHAREPOINT USER GUIDE

Reader and Contributor

Date	Revision	Description	Author
3 September 2013	**1.0**	Original	**Joe Ben Clark**

Contents

SharePoint User Guide – Reader/Contributor v1

Accessing the CDISC Portals

You can access the portal by going to the CDISC website homepage and clicking on the "Portal" on the top right corner or by directly using the CDISC Portal URL: http://portal.cdisc.org/Pages/Home.aspx

Introduction / Sign In

Welcome to CDISC Portals, where members and volunteers can collaborate on projects and documents. Our Home Page features the calendar of CDISC Events and the contact email for the Portal Administrator. Visitors can also navigate through the "Public Comment Tracker" and "CDISC User Groups" without signing in. If you would like to gain further access to the CDISC Portals, you can contact our Portal Administrator .

To sign in, please click on the "Sign In" link on the top-right corner of the webpage. Once you have successfully verified your account, you will be able to change your password by clicking again on your username on top right corner, a drop down menu will appear and you will find the option to "Change Your Password".

If you have already been provided a log in, **it is highly advised that you change your password immediately post sign-on.** Please keep in mind that when you change the password, it has to be:

- Not less than 7 characters
- At least one non-alphanumeric character is required. Example: the underscore _
- Password is case-sensitive

FORGETTING THE PASSWORD:

If the user forgets the password, they must contact the Portal Administrator (portaladmin@cdisc.org) to request recovering the password. An automated email will be sent to the user's email account that is connected to the portal account, with instructions on how to change the password during the first log in duration.

ENTERING A WRONG PASSWORD:

If a user tries to log in for five times with the wrong password, the account will be locked and the user will have to contact the Portal Administrator (portaladmin@cdisc.org) to unlock the account and to recover the password. The user will subsequently receive an automated email with a new password and will be requested to copy and paste this password in order to change it in the first log in duration.

Portal Site Structure:
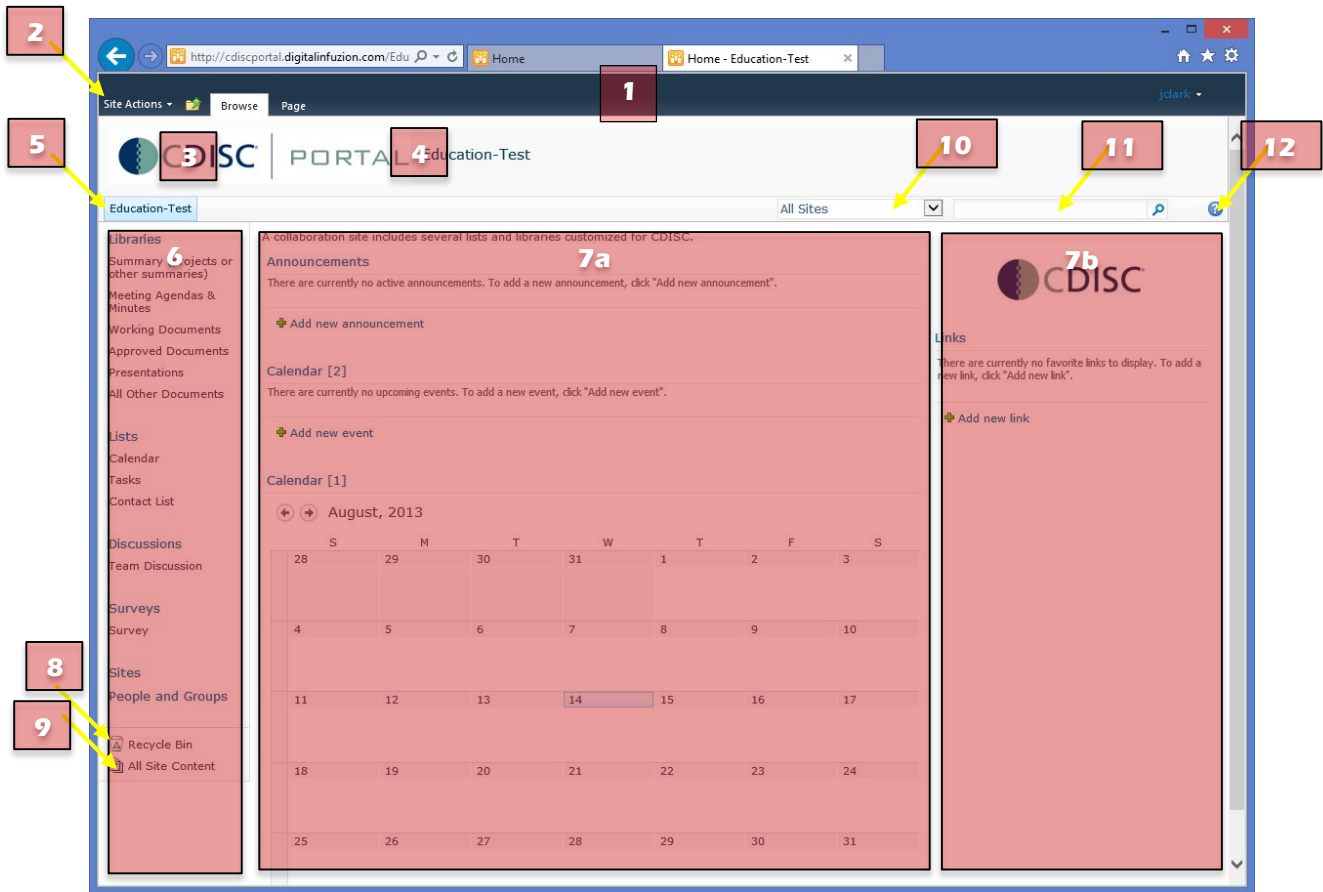
Structural Elements of the CDISC Portals Site:

1. Ribbon bar: A blue ribbon on top containing different tabs according to the user's access level such as the User Menu. As the user signs in, this menu appears as a hyperlink that drops down by clicking on the user's name at the top right corner of the ribbon tab (example: jclark). The User menu drop down provides options to help the users to customize their own portal account such as:
   - Change of password
   - My settings
   - My Account information
   - Sign out

2. Site Actions Menu: it provides administration options to the users that have administration rights such as: editing of their team's portal site and its content. (May not appear on some sites)
3. Site Logo: located on the right side of the breadcrumb trail.
4. Breadcrumb trail: The breadcrumb navigation is located above the Navigation bar; it indicates the current location on the portal site by showing the thread to the corresponding portal part that the user is navigating. So by clicking on a particular element within a breadcrumb thread or trial the user is directed to the selected portal site.
5. Top Navigation bar/area: The top navigation bar is customized to display links of the sub-sites (Sub-portals) that are created under a specific portal to allow users to navigate through the portal site.
6. Left Navigation Panel/ Quick launch bar: it allows users to navigate through the different content types of a portal site. The contents of the CDISC portals quick launch bar are predefined, it comprises of Discussions, Documents, Lists, and Surveys and Sites. Under "Sites" comes the next lower level of sub-sites that are created under the current portal site.

7. Content Area: The content area is customized to consist of a larger center content area (a) which contains one or more web parts, and a smaller right content area (b) which contains only one web part in case of the CDISC portals.
   - What is the Web Part: is the basic structural part of a Web Part Page, it is an independent component that can be shared and personalized by all users who have permission to access it.
   - Team leaders and users that have administrator rights can add new Web Parts according to the portal site and team requirements including content types such as document libraries, discussion boards, lists and surveys.
8. Recycle Bin
9. All site content links
10. Search Scope
11. Search box
12. Help button

CDISC Portal Site Access Rights:

1. Public access: The public can visit the CDISC portal areas that are allowed to be accessible by the public for example the "CDISC User Networks" without requiring a user account. All other portals require access credentials to sign in to view contents.
2. Member access: This can be acquired by requesting a portal account from the Portal Administrator (portaladmin@cdisc.org) or the team leader to enable the user to visit specific areas on the website and read documents or edit and upload documents.

   Depending on the user's role, they will be granted one of the following permission levels:
   - **Visitor Access**: the user will be able to read content of the portal site they have been granted permission to access.
   - **Contributor access**: the user will be able to read/edit/upload documents on the portal site that they have been granted access.
   - **Administrator access**: in addition to the contributor rights, the user will be able to create a portal group, grant permissions to users, and change contents of the portal site that they have been granted administration rights to.

Subscribing to Alerts:

Purpose: this feature helps to set up an email notification to be sent to the user's email account that is connected with the portals account whenever changes are made to content in a portal site.

Setting Up an Alert of Document Libraries and Lists:

- Go to the document library or the list you would like to be alerted on.
- Click on the library tab on the top menu bar
- From the "Share & Track" section, click "Alert Me"
- Select "Set alert on this library" from the drop down menu that will emerge
- New Alert dialog box will appear, choose the type of alert that you would like to receive from the "Change Type" section.
- You can filter alerts and specify frequency in the "When to Send Alerts" section.
- Click "OK" to create your alert.
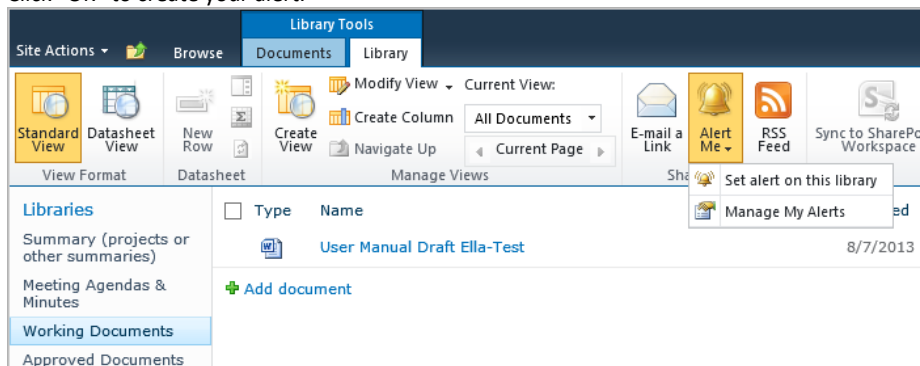
Setting up alerts to an item:

- Go to the document Library/List you would like to visit
- Move the mouse pointer on right side of the required document
- An arrow will appear, by clicking on the arrow a drop down menu will appear
- Choose "Alert Me", Alert dialog box will emerge to specify the type of alert you would like to have
- Choose the type of alert that you would like to receive from the "Change Type" section.
- You can filter alerts and specify frequency in the "When to Send Alerts" section.
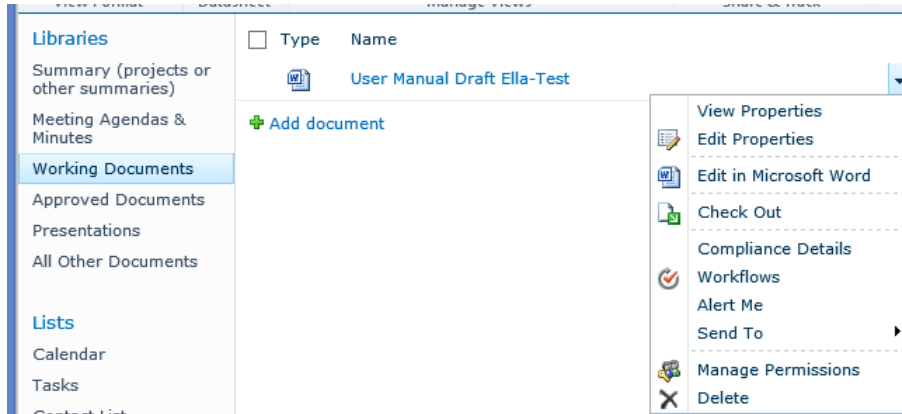

- By clicking "OK" the alert is set up and you are taken back to the Document library or List

Manage My Alert Settings:

- Click on the username at the top right corner of the ribbon bar
- Select "My Settings" from the drop down menu that emerges
- Click "My alerts" to update alerts settings, a new edit screen appears where entries can be added or modified.

Managing Documents within a Document Library:

Purpose: The Document library tool enables teams to share information and documents to facilitate group collaboration; enhancing both individual as well as team productivity. Various document files and folders can be stored, organized or shared within a library. The Document Libraries are listed under the word "Documents" on the left quick launch of each portal page.
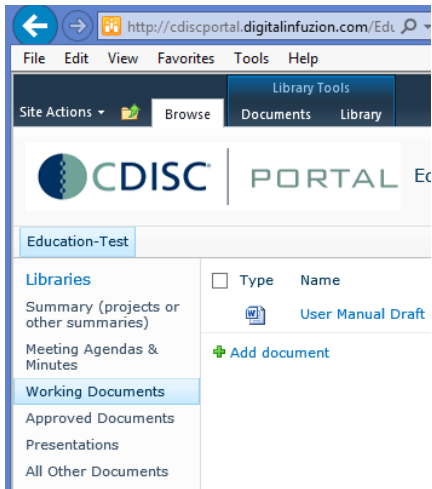
Reading content:

To open a file within a document library, click on the document of interest by a left mouse click and according to the user's permission level the file could be opened in a read only or edit format.

Creating a New Document Library:

To create a new document library you have to:

- Click on the hyperlinked word "Documents "from the left quick launch, under which all document libraries are listed, another window will open listing all other document libraries within a specific portal site.
- Click on the option "Create" that is located immediately under the top navigation bar (see image below)

- Select "Document Library" from the various options provided in the new window. (This window style is only available when Silverlight is installed. Your view may be different. Silverlight can be installed at http://www.microsoft.com/silverlight/)

SharePoint User Guide – Reader/Contributor v1
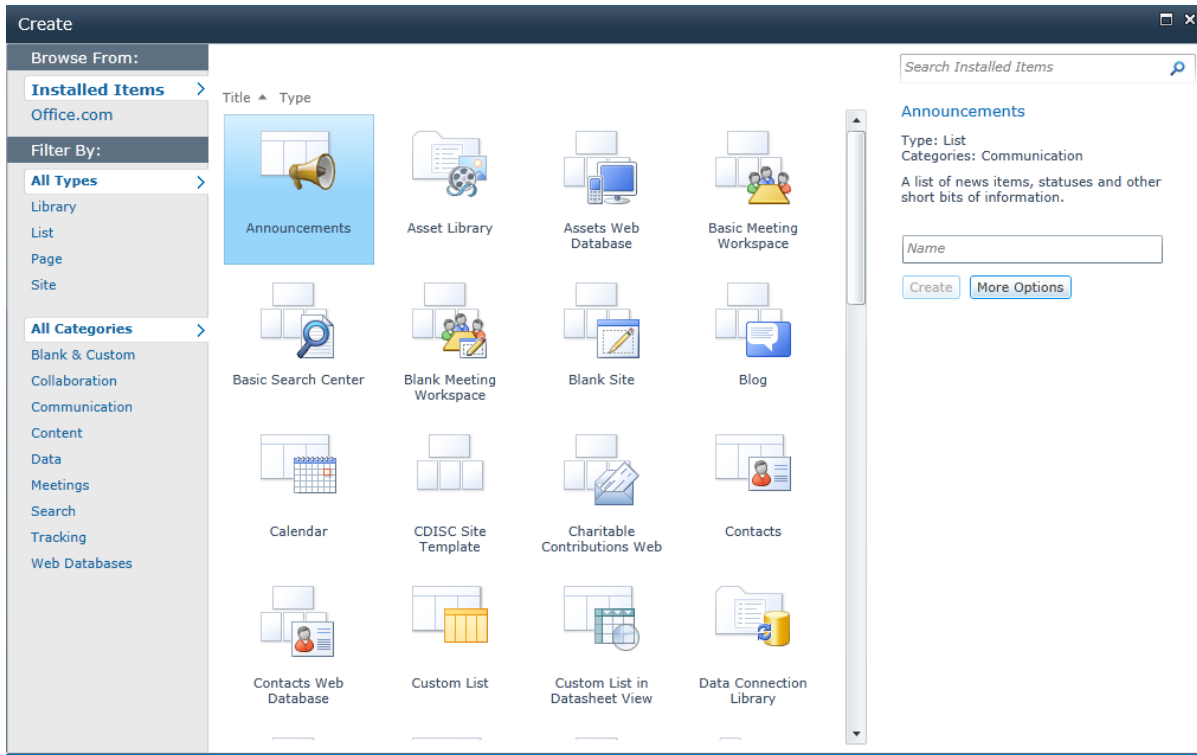
- Click 'More Options' below the Document Library Name field to retrieve more fields to configure. Then you will be prompted to enter the required information in the blank fields. Please make sure to read the instructions on the left side of each field so that you can enter the right information according to your requirements.
- Upon finishing, confirm by clicking on "Create" at the bottom. The new Document Library name will be listed under Documents on the landing page of that specific portal.

Creating a New Folder:

Document Libraries are created to store and organize all types of documents. Files can be stored in a library either as an individual file or can be stored in a folder. To create a new folder within a specific document library, the user will be required to choose the document to which would like to add the folder, and then create the folder as follows:

- While viewing a document library. Select "Documents" tab on the top ribbon bar under "Library Tools"
- Select "New Folder" from "New" under "Documents", a new window will appear to prompt you to enter the new folder's name and to save it.

SharePoint User Guide – Reader/Contributor v1
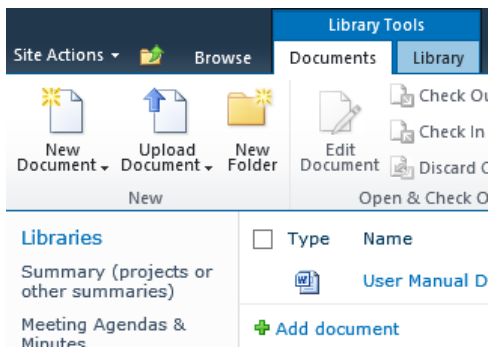
Downloading documents: A document can be downloaded by clicking on the title. You will see the option of "Open", "Save", or "Save as…" (Depending browser and version)

Uploading Documents:

Users can upload any kind of document stored in any location whether a PC, a USB drive or even a file shared on the internet.

- Select the document library that is required to upload the document to (the destination library)
- Click on "Documents" tab on the ribbon bar.
- Click on "Upload Document" option on the top menu bar, a drop down menu will appear providing options to upload individual documents and multiple documents.
- Browse the required files by clicking on the "Browse" hyperlink.
- Locate the file to upload and click "Open".
- Choose option to overwrite existing files and click OK to upload.
- The user can also add a document to the documents library by clicking on "+Add document" hyperlink in the left content area of that specific library which appears with a green plus sign next to it.

Note: Users have the option of uploading individual files or entire folders.

Modifying Documents:

To enter modification on the information of a document stored within a Document Library, you can start by

- Selecting the document library where the document in request is stored.
- Selecting "Edit Properties" from the drop down menu that emerges when clicking on the arrow on the right side of the required document.
- A new dialog box opens where you can change the name of the document, the title, or paste a copied part to it, then save the changes by clicking on the "Save" option.
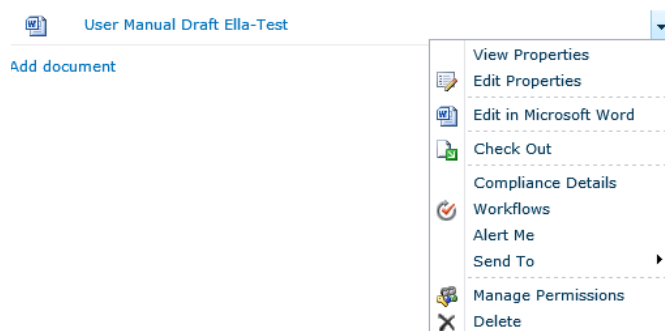
Editing Documents Contents:

To edit a document within a document library you can either

1. Edit a document :
   - Click on the arrow that appears to the right of the document of interest.
   - Select "Edit in Microsoft Word" to open the document.
   - Click "Enable Editing" then Click "Save" to save the changes you entered to the document.

2. Edit a document offline:
   You will be required to download the document before you start entering any on the content and then upload it back again. (See download and upload documents)

In order to overwrite the old document with the modified document, you must ensure that
a) The document name was not changed during the modification.
b) The tick box "Overwrite existing files" within the document upload screen is ticked.

Managing Lists:

Managing Calendar Items:

Purpose: The calendar list is one of the list items that are provisioned on the CDISC Portals Website for teams use to share and maintain information about the upcoming events.

Adding New Calendar Items

There are two ways to add a new calendar event and update a calendar list: the first way is to;

- Click on the hyperlink word "**calendar**" under "**Lists**" on the quick launch, a calendar of the current month will open.
- Click on the green plus sign with the word "**+Add** "that appears by placing the cursor on the number of the required day within the calendar, a new dialog box opens to fill with the event's information.
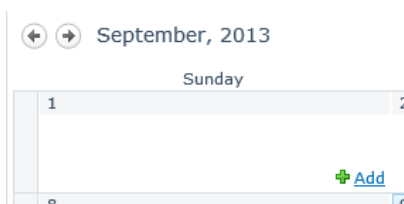
The second way is to:

- Click on "Calendar Tools" on the Ribbon at the top
- Click "Events"
- Click "New Event" to open a new dialog box.
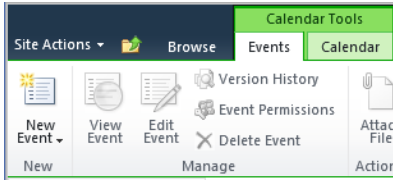
Add the details of the new event including the title of the event, the location, the start and end time. If the meeting will extend all day, the corresponding tick Box has to be ticked. The recurrence of the meeting can be set by checking the tick box "Make this a recurrent event" to specify the recurrence pattern and date ranges then click "Save" to save the changes that have been made.

Modify an existing Calendar Item:

- To modify and update an existing calendar event, choose the event by clicking on it and then click "Edit Item".

Deleting a Calendar Item:

- Click on the event on the Calendar to open a new dialog box, click "delete item" and confirm by clicking on "OK" in the second dialog box and close the first dialog box
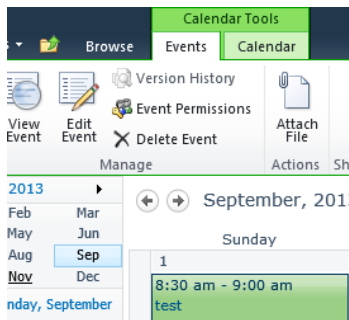

Managing Contacts List:

Purpose: The contacts list is another item that is provisioned on the CDISC portals website under "Lists", to add the contact details of each group of users within a specific portal.

Adding New Contacts:

- select "Contact List" from the left Quick Launch.
- Click on"+ Add New Item" located in the content area of the portal site, immediately under the last provided contact.
- A new dialog box will open to enter the required information. Required fields are marked with a red asterisk (*).
- Click "Save" to complete the process.

Modifying an Existing Contact:

- Click on the arrow that appears by placing the cursor on the right side of the contact's last name
- Choose "Edit Item" from the drop down menu to open a new dialog box
- Enter the new information and click "Save" to complete the process

SharePoint User Guide – Reader/Contributor v1
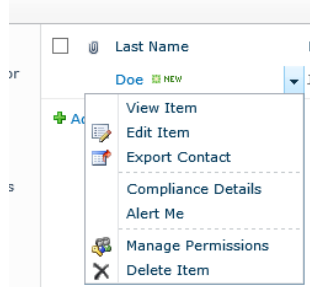
Deleting an Existing Contact:

- Click on the arrow that appears by placing the cursor to the right side of the contact's last name, a drop down menu opens to select "delete item".
- To delete multiple contacts, click on the check box next to each name. From the ribbon bar, choose the "Items" tab and click "Delete Item". Click OK on popup to send to recycle bin. (You can recover any deleted contact from the recycle bin located in the bottom left corner of the page.)

Managing Tasks:

Tasks list is the third item that is predefined for the CDISC Portals under Lists to allow team members to collaborate and organize their tasks.

Adding New Tasks:

- Click on "Tasks" under Lists on the quick launch panel on the left to open the tasks lists
- Click on the option "+ **Add new item"** that has a green plus sign to open a dialog box and enter the new task information. Fields marked with a red asterisk (*) are required.
- One of the options provided in the dialog box is to assign the task to a specific user by entering the portal user's name or identifying the user by searching the user's name from "Directory" icon, a search box will open to enter the user's name then to select it from a list of option, then click "OK" to complete the process

Modifying Existing Task:

An existing task can be modified by choosing "Edit Item" from the drop-down menu that emerges from the arrow on the right of that task title, an edit dialog box will open to enter the new information and complete the process by clicking "OK".
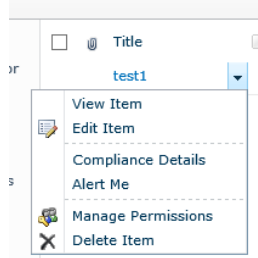
Deleting Tasks:

A task can be deleted by choosing "Delete Item" from the drop-down menu to the right of the task title in question, a new dialog box will appear to confirm the deletion process by clicking "OK".

SharePoint User Guide – Reader/Contributor v1