

Office SharePoint® 2013 Introduction

SharePoint is highly customizable. Some of the options and features on this card may not be available to you.



Accessing a SharePoint Site

1. Type the site address in your browser. Press <Enter>.
2. If prompted, type your USER NAME and PASSWORD. <Click> OK.

Signing Out

1. <Click> on your name in the top right, then SIGN OUT.
2. Close all open browser windows.

Navigating SharePoint

- To go to the home page of a site <Click> HOME or choose <HOME> in your tags.
- Use the Top Links area and Quick Launch area to go to subsites, pages, libraries, and other sites.
- Your site content is organized into libraries (for documents, web pages, slides, etc.) To go to all items, <Click> one of the Top links or a Quick Launch area link, or choose SITE CONTENTS, then a library.
- To navigate to a folder <Click> its name or, to move up one folder from the current content, choose <BROWSE>, then a breadcrumb link, or choose <UP> arrow, then <Previous link>.
- To open or download a file, <Click> on it in the main content area.
- To see a recent history view, <Click> a link in the Quick Launch area or the heading RECENT.
- To see all documents, in the Quick Launch area <Click> DOCUMENTS.
- If Two View is enabled, you can see a Summary of the entire site in the Quick Launch area. If not:
 1. <Click> GO, then choose SITE SETTINGS.
 2. Under LOOK AND FEEL, <Click> TREE VIEW.
 3. <Check> ENABLE TREE VIEW. <Click> OK.

Subsites

Parent sites are sites with one or more subsites. Subsites allow other users and group permissions from the parent site. To navigate to a subsite from the top navigation, <Click> a shortcut in Top Links or the Quick Launch area, or choose SITE CONTENTS, then under the SUBSITES heading <Click> a subsite.

Expanding the Main Content Area

To hide the Quick Launch area and Top Links to expand the view for a larger main content area, <Click> [X]. To return, <Click> [X].

Creating a New List Item

A list is a group of similar items, such as calendar events, tasks, or announcements. To create a new item:

1. Navigate to the desired list.
2. <Click> [New] (list item) in the content area. Or, choose the [New] or [Add New] Ribbon tab, then NEW ITEM/CONTENT.
1. Fill out the form details. <Click> SAVE.

Editing a List Item

1. <Click> [Edit] next to the item, or <Right Click> the item.
2. To edit, <Click> EDIT ITEM, make changes, then <Click> SAVE.
- To delete, <Click> DELETE ITEM, then OK.
- To edit/delete multiple items at once:
 1. Select items by <Clicking> in the [] column next to the items.
 2. To edit, choose FIELDS, EDIT ITEM, make changes, then <Click> SAVE.
 - To delete, choose ITEMS, [X] Delete Item, then <Click> OK.

Assigning a Task

When creating or editing a task:

1. In the ASSIGNED TO field, type in all or part of the name of the person you are assigning the task to.
2. <Click> a suggested name or press <Enter>.
3. For more options such as percentage complete, a description, priority or task status, <Click> SHOW MORE.
4. <Click> SAVE.

Viewing Your Update Stream*

Get updates on sites, files, and people on your Newsfeed. On the global navigation bar <Click> NEWSFEED.

Following a Site*

Followed sites are displayed on the NEWS start page, and updates are displayed on the Newsfeed.

1. Navigate to the site you want to follow.
2. <Click> [Follow] on the ribbon.
- To access followed sites, <Click> SITES, then choose one under the heading SITES I'M FOLLOWING.

Following a Document/File*

1. Select the document/file by <Clicking> in the [] column next to it.
2. Choose FILE, FOLLOW.

Following a Person*

Follow the activities of a colleague to see where they tag content, change their work status, accomplish a task, and more.

1. Search for a person.
2. In the search results, [hover] over their profile.
3. <Click> FOLLOW.
- Or, <Click> a person's name in a list or library, then <Click> FOLLOW.

Engaging in Newsfeed Conversations*

To post a new message:

1. Open your Newsfeed by <Clicking> NEWSFEED.
2. To change who to share with, <Click> the group next to SHARE WITH and choose a group.
3. Type a message into the field below.
4. To add an image, <Click> [Add], then <Browse> to find an image. Choose image, then <Click> OPEN, UPLOADED.
5. <Click> POST.

To respond to a Newsfeed post:

1. <Click> REPLY.
2. Type message and/or attach image, then <Click> POST.

Using @ Mentions*

To include someone in a message: Type "@" then the first letters of their name, then choose a suggested contact. To see the posts/activities of a person mentioned, <Click> @Name.

To follow a person mentioned: On a post that includes the tag, <Click> FOLLOW @Name, or <Click> [Follow] from FOLLOW @Name. Or, <Click> a tag, then <Click> @Name.

Using # Tags*

To tag a message with a theme or category: type "#" then a keyword(s), e.g., #HSE. To tag can be used in a post. To see all posts tagged with a keyword: <Click> the #tag.

To follow a tag: On a post that includes the tag, <Click> FOLLOW #tag, or <Click> [Follow] then FOLLOW #tag. Or, <Click> a tag, then <Click> #tag.

Liking a Newsfeed Update*

Using a Newsfeed Update shows you appreciate the item or comment.

1. <Click> NEWSFEED.
2. At the bottom of the post, <Click> LIKE. To see your liked posts, <Click> [Like], then LIKES.

Tagging, and Adding Notes to Documents and Pages

Add tags and notes to documents and pages to remember, categorize, and leave comments for yourself and others.

1. Select a document or navigate to a page.
2. Choose FILE or LIBRARY, TAGS & NOTES.
3. To add a tag: <Click> the TAGS tab. Start typing a tag. Select from the SUGGESTED TAGS list, finish typing, or <Click> CREATE NEW. Add more tags if desired, then <Click> SAVE.
- To add notes: <Click> the NOTE BOARD tab, type a note, then <Click> POST. When done, <Click> [X].

Sharing Files with People

You can share files in SharePoint with people inside and outside your organization.

1. Make a selection, then choose FILE, SHARE or <Click> [Share].
- Or to share a single item, <Click> [Share], or <Right Click> then choose SHARE.
2. Enter names and email addresses to share with. Include a personal message. Choose CAN VIEW or CAN EDIT. For more options, <Click> SHOW.
3. <Click> SHARE.

Viewing Tags and Notes*

To view the tags and notes for a document or page:

1. Select a document or navigate to a page.
2. Choose FILE or LIBRARY, TAGS & NOTES.
3. To view all documents and pages tagged by a keyword, <Click> one of the SUGGESTED TAGS, then GO TO TAG PROFILE FOR...

To view your tags and notes <Click> [My Tags].

*Not available with SharePoint Foundation. Available with SharePoint Server only. For tagging and notes, the user interface must be configured and activated. © 2013 Oracle Software Services, Inc. All rights reserved.

Sharepoint Services 3quick Reference Guide

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Sharepoint Services 3quick Reference Guide:

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