

# 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 BROWSE, or your logo.
- Use the Top Links area and Quick Launch area to go to subsites, pages, libraries, and other apps.
- Some site content is organized into libraries (for documents, web pages, slides, etc.). To go to a library, [Click] one of the Top Links or a Quick Launch area link, or choose SITE CONTENTS, or choose SITE CONTENTS.
- 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 LIBRARY, then .
- To open or download a file, [Click] on it in the main content area.
- To see a recent list/library/etc. [Click] a link in the Quick Launch area under the heading RECENT.
- To see all documents, in the Quick Launch area [Click] DOCUMENTS.
- If Tree View is enabled, you can see a hierarchy of the entire site in the Quick Launch area. If not:
  1. [Click] , 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 often inherit user 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] . To return, [Click] .

## 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 ITEMS or CALENDAR Ribbon tab, then NEW ITEM/EVENT.
3. Fill out the item details. [Click] SAVE.

## Editing a List Item

1. [Click] 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 ITEMS, EDIT ITEM, make changes, then [Click] SAVE.
- To delete, choose ITEMS, , 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 SITES start page, and updates are displayed on the Newsfeed.

1. Navigate to the site you want to follow.
2. [Click] .
- 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 FILES, FOLLOW.

## Following a Person\*

Follow the activities of a colleague to see when 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] , then BROWSE to find an image. Choose image, then [Click] OPEN, UPLOAD.
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] then FOLLOW @name. Or, [Click] a tag, then .

## Using # Tags\*

To tag a message with a theme or category: type "#" then a keyword (e.g., #HR). Six tags 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] then FOLLOW #tag. Or, [Click] a tag, then .

## Liking a Newsfeed Update\*

Liking 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] , 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 FILES or LIBRARY, TAGS & NOTES.
3. To add a tag: [Click] the TAGS tab. Start typing a tag. Select from the SUGGESTIONS 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] .

## Sharing Files with People

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

1. Make a selection, then choose FILES, SHARE or [Click] .
- Or to share a single item, [Click] , 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 FILES 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] .

\*Not available with SharePoint Foundation. Available with SharePoint Server only. For tagging and notes, the social features must be configured and activated.

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# Microsoft Sharepoint 2013 Quick Reference Guide

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