

## SharePoint Window

The screenshot shows the SharePoint interface with the following components labeled:

- Ribbon:** The top navigation bar containing tabs like BROWSE, FILES, and LIBRARY.
- Title Link:** The main title of the page, "Quotes, Sign-offs & Referrals".
- Top Link bar:** The secondary navigation bar with links like EXHILAR8 MAIN, REPORTING, and gr8 Events.
- User Menu:** The user profile dropdown menu in the top right corner.
- Settings button:** The gear icon in the top right corner.
- Search box:** The search input field in the top right corner.
- Quick Launch bar:** The left-hand navigation pane listing site sections like Home, Recent, Client Surveys, etc.
- Web Parts area:** The main content area displaying a document library with columns for Name, Modified, Modified By, and Approval Status.

## Permission Levels

- **Full Control:** Site Owners are given this permission level by default.
- **Design:** Create lists and document libraries, edit pages and change the site appearance.
- **Contribute:** Add, edit, and delete existing items in libraries and lists. Site Members are given this permission level by default.
- **Read:** View and open items, pages and documents. Site Visitors are given this permission level by default.
- **Limited Access:** Get access to a specific list, item, or document without access to the entire site.



## Quick Launch Tip



Because the Quick Launch bar is customizable (depending on your permission level) not all the lists and libraries may be listed here. If you can't find what you're looking for, go to the Site Contents page.

## The Fundamentals

- **To navigate in a SharePoint site:** SharePoint works like any other website, and depending on your permission level, you will have access to the Office Ribbon for editing and formatting.
- **To view all the content on the Current Site:** Click the **Site Contents** link at the bottom of the Quick Launch bar to view all the lists, libraries, discussion boards, surveys, and subsites.
- **Understanding Permission Levels:** Each user that has access to a site is assigned a permission level. See the list on the right for more information about permission levels in SharePoint.
- **To Search:** Click in the Search box at the top of the page. Type your search word or term and press **<Enter>**.
- **To Change Views:** You can change how items are displayed in a library or list by changing views. Click the **LIST** or **LIBRARY** tab on the Ribbon and then select the **Current View** list arrow in the Manage Views Group to select the view you want to use.
- **To Sign Out:** Click the **User menu** at the top of the screen and select **Sign Out**.
- **To Sign In as a Different User:** Sign out and then on the logon window, click the **Use another account** option. Enter the alternative user information in the dialog boxes provided and logon.
- **To Change User Settings:** Click the **User menu** at the top of the screen and select **My Settings**. Click the **Edit Item** link and update or change your settings as necessary.
- **To Get Help:** Click the **? Help** button in the top right corner of the SharePoint site page.



## Documents

- **Document Library:** A document library lets users share, collaborate, collect, and manage files with others.
- **Open and Edit a Shared Document:** Open the library containing the document you want to open or edit. Select the document link and in the dialog box that appears, click **Allow**. To edit a document, click the **FILES** tab, then select **Edit Document** from the Open & Check-out Group.
- **Check Out a Document:** Click the **FILES** tab, then select **Check Out** from the Open & Check-out Group.
- **Check In a Document:** Open the Library containing the document you want to check in. Select the document, click the **FILES** tab, then select **Check In** from the Open & Check-out Group. (If you're editing a document when you save it, you will be given the option to check it back in at that time.)
- **Create a New Document:** Navigate to the library or folder in which you want to create a document. Click the **FILES** tab, then select **New Document** from the New Group – MS Word is the default program for this action.
- **Create a New Folder:** Navigate to the library or folder in which you want to create a new folder. Click the **FILES** tab, then select **New Folder** from the New Group.
- **Upload a Document:** Open the Library into which you want to upload a document. Click the **FILES** tab, then select **Upload Document** from the New Group.

## Wikis

- **View a Wiki:** Click the name of the Wiki in the Quick Launch bar or on the Top Link bar if it's a Subsite.
- **Add a Wiki Page:** Open the wiki site and click the **New Wiki Page** link.
- **Create a Wiki Link:** Type the page name enclosed in double brackets in the wiki content area. E.g. type `[[Page Name]]`.
- **Edit a Wiki:** Open the wiki page and click the **PAGE** tab, then select **Edit** from the Edit Group.

## Blogs

- **View a Blog:** Click the name of the Blog in the Quick Launch bar or on the Top Link bar.
- **Create a Blog Post:** Open the blog site and click **Create a post** in the Blog Tools list on the right side of the page.
- **Comment on a Blog Post:** Open the post and click the **Comments** link below the post.
- **Receive Blog Updates through an RSS Feed:** Open the blog site. Click the **RSS Feed** link below the Blog Tools list.



## Surveys & Discussions



- **Respond to a Survey:** Open the survey to which you want to respond. Click **Respond to this Survey**.
- **View Survey Responses:** Open the survey for which you want to see responses. Click the **Show a graphical summary of responses** or **Show all responses** link. (You can also change the View using the Ribbon.)
- **Create a New Discussion Topic:** Open the discussion to which you want to contribute. Click the **New Discussion** link.
- **Reply to a Discussion Topic:** Open the discussion to which you want to reply. Select the discussion thread and click the **Reply** link beneath the post, or type your reply directly into the **Add Reply** field below all the posts.

## Lists

- **Add an Event:** Open the calendar you want to add an event to, and click the **EVENTS** tab and then select **New Event** from the New Group.
- **Synchronize SharePoint Calendar with Outlook:** Open the calendar you want to synchronize. Click the **CALENDAR** tab and then select **Connect to Outlook** from the Connect & Export Group.
- **Add a Task:** Open the tasks list you want to add a task to, and click the **New Task** link.
- **Update a Task:** Select the task and click the **Edit** link, or click the task link, and then select **Edit Item** from the Manage Group on the Ribbon.
- **Edit an Item:** Open the list that contains the item you want to edit. Select the item and click the Open Menu button (...), then select **Edit Item** from the list.
- **Delete an Item:** Select the item you want to delete and click the Open Menu button (...), then select **Delete Item** from the list.
- **Restore an Item:** Click the **Settings** button and then select **Site Settings**. Open the Recycle Bin from the Site Collection Administration section. Check the box next to each item you want to restore and select the **Restore Selection** link.
- **Receive Alerts:** You can receive alerts on most items. Open the item you want to be alerted on, click the **ITEMS** tab and then select **Alert Me** from the Share & Track Group.



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