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QUE

Steve Johnson, Perspection, Inc.

# SharePoint® 2013 onDemand

Steve Johnson, Perspection, Inc.



**que**® Que Publishing, 800 East 96th Street, Indianapolis, IN 46240 USA

# SharePoint® 2013 on Demand

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*Perspection*

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**Steve Johnson** has written more than 80 books on a variety of computer software, including Adobe Photoshop CC, Adobe InDesign CC, Adobe Illustrator CC, Adobe Dreamweaver CS6, Adobe Edge Animate, Adobe Flash Professional CS5, Microsoft Windows 8, Microsoft Office 2013 and 2010, Microsoft Office 2008 for the Macintosh, and Apple OS X Mountain Lion. In 1991, after working for Apple Computer and Microsoft, Steve founded Perspection, Inc., which writes and produces software training. When he is not staying up late writing, he enjoys coaching baseball, playing golf, gardening, and spending time with his wife, Holly, and three children, JP, Brett, and Hannah. Steve and his family live in Northern California, but can also be found visiting family all over the western United States.

A large, light blue, lowercase letter 'a' is positioned in the bottom left corner of the page, partially overlapping the light blue vertical bar.

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# Introduction

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Welcome to *SharePoint 2013 on Demand*, a visual quick reference book that shows you how to work efficiently with Microsoft SharePoint. This book provides complete coverage of basic to advanced SharePoint skills.

## How This Book Works

You don't have to read this book in any particular order. We've designed the book so that you can jump in, get the information you need, and jump out. However, the book does follow a logical progression from simple tasks to more complex ones. Each task is presented on no more than two facing pages, which lets you focus on a single task without having to turn the page. To find the information that you need, just look up the task in the table of contents or index, and turn to the page listed. Read the task introduction, follow the step-by-step instructions in the left column along with screen illustrations in the right column, and you're done.

## What's New

If you're searching for what's new in SharePoint 2013, just look for the icon: **New!**. The new icon appears in the table of contents and throughout this book so you can quickly and easily identify a new or improved feature in SharePoint 2013. A complete description of each new feature appears in the New Features guide in the back of this book.

## Keyboard Shortcuts

Most menu commands have a keyboard equivalent, such as Ctrl+B, as a quicker alternative to using the mouse. A complete list of keyboard shortcuts is available on the web at [www.queondemand.com](http://www.queondemand.com) or [www.perspection.com](http://www.perspection.com).

## How You'll Learn

**How This Book Works**

**What's New**

**Keyboard Shortcuts**

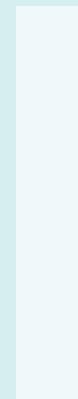
**Step-by-Step Instructions**

**Real World Examples**

**Workshops**

**Microsoft Certification**

**Get More on the Web**



# Step-by-Step Instructions

This book provides concise step-by-step instructions that show you “how” to accomplish a task. Each set of instructions includes illustrations that directly correspond to the easy-to-read steps. Also included in the text are time-savers, tables, and sidebars to help you work more efficiently or to teach you more in-depth information. A “Did You Know?” provides tips and techniques to help you work smarter, while a “See Also” leads you to other parts of the book containing related information about the task.

**Touring SkyDrive**

SkyDrive allows you to manage, share, and work with documents in a SharePoint cloud with SkyDrive Pro (Browsers). SkyDrive Pro performs the same function for SharePoint sites as the stand-alone SkyDrive app—SkyDrive (Win 8) or SkyDrive for Windows (Win 7)—do for SkyDrive personal. With SkyDrive Pro, you can connect to and synchronize the contents of the SkyDrive library on a SharePoint or Office 365 site with a folder on your desktop or device with a SkyDrive Pro sync client app. In Windows Explorer, your synced SkyDrive is listed in your Favorites in a folder named SkyDrive Pro, where you can directly work with files.

**Use SkyDrive Pro on SharePoint to Sync Files**

- 1 In your web browser, open your SharePoint site.
- 2 Click SkyDrive on the Navigation bar.
- 3 Use the site commands to add, remove, or edit files.
- 4 Click the Sync button on the Navigation bar.
- 5 Click Sync Now.

SharePoint starts syncing the library.

- 6 To open your synced library folder in Windows Explorer, click Show my files.

**Did You Know?**

There are some limits on syncing metadata. You can sync up to 20,000 items in your SkyDrive Pro library or 5,000 items in other SharePoint libraries. In any library, you can download files up to 2 GB in size.

**See Also**

See Chapter 7, “Working with SkyDrive Documents” on page 159 for more information on using SkyDrive Pro.

80 Chapter 2

Numbered steps (1-6) in the text correspond to numbered callouts (1-6) in the illustrations. Callout 1 points to the SkyDrive icon in the SharePoint navigation bar. Callout 2 points to the Sync button. Callout 3 points to the Sync Now button. Callout 4 points to the Sync button in Windows Explorer. Callout 5 points to the Sync Now button in Windows Explorer. Callout 6 points to the Sync Now button in Windows Explorer.

**Easy-to-follow introductions focus on a single concept.**

**Illustrations match the numbered steps.**

**Numbered steps guide you through each task.**

**See Also points you to related information in the book.**

**Did You Know? alerts you to tips, techniques and related information.**

# Real World Examples

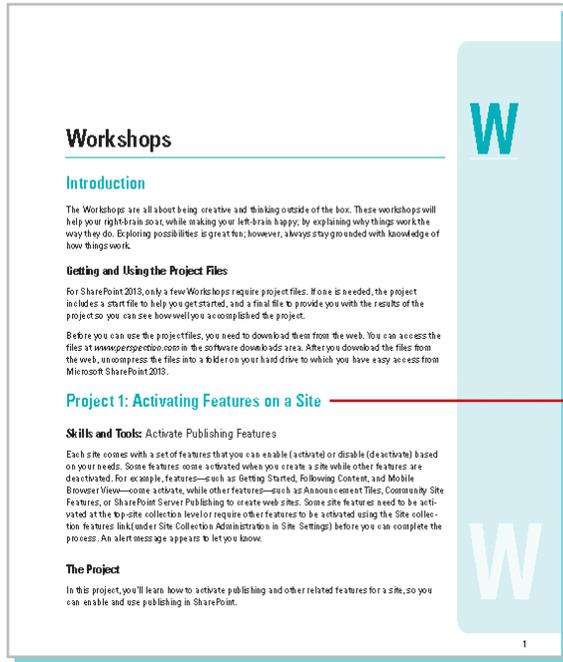
This book uses real world examples files to give you a context in which to use the task. By using the example files, you won't waste time looking for or creating sample files. You get a start file and a result file, so you can compare your work. Not every topic needs an example file, such as changing options, so we provide a complete list of the example files used through out the book. The example files that you need for project tasks along with a complete file list are available on the web at [www.queondemand.com](http://www.queondemand.com) or [www.perspection.com](http://www.perspection.com).

SharePoint social site showing a conversation thread. The 'Following' button is highlighted with a red callout.

**Real world examples help you apply what you've learned to other tasks.**

# Workshops

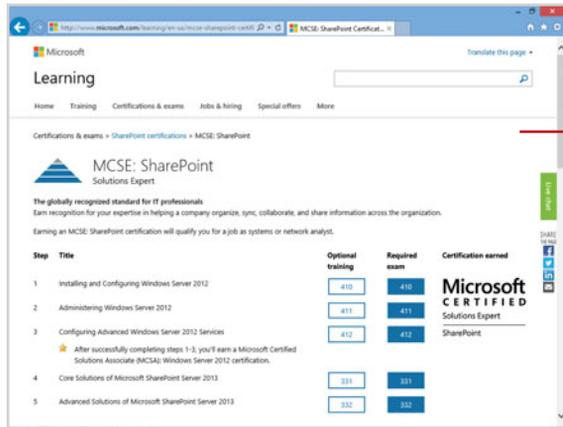
This book shows you how to put together the individual step-by-step tasks into in-depth projects with the Workshops. You start each project with a sample file, work through the steps, and then compare your results with a project results file at the end. The Workshop projects and associated files are available on the web at [www.queondemand.com](http://www.queondemand.com) or [www.perspection.com](http://www.perspection.com).



The **Workshops** walks you through in-depth projects to help you put SharePoint to work.

# Microsoft Certification

This book includes related content for the Microsoft Certification exam (70-331) for Microsoft SharePoint 2013. Each certification exam has a set of objectives, which are organized into broader skill sets. To prepare for the certification exam, you should review and perform each task identified with an objective to confirm that you can meet the requirements for the exam. Information about the certification program and objectives are available online from Microsoft at [www.microsoft.com](http://www.microsoft.com).



Microsoft **Certification** allows you to become an expert on SharePoint.

## Get More on the Web

In addition to the information in this book, you can also get more information on the web to help you get up to speed faster with SharePoint 2013. Some of the information includes:

### Transition Helpers

- ◆ **Only New Features.** Download and print the new feature tasks as a quick and easy guide.

### More Content

- ◆ **Photographs.** Download photographs and other graphics to use in your Office documents.
- ◆ **More Content.** Download new content developed after publication.

You can access these additional resources on the web at [www.perspection.com](http://www.perspection.com).

## Keyboard Shortcuts

### Microsoft SharePoint 2013

If a command on a menu includes a keyboard reference, known as a keyboard shortcut, to the right of the command name, you can perform the action by pressing and holding the first key, and then pressing the second key to perform the command quickly. In some cases, a keyboard shortcut uses three keys. Simply press and hold the first two keys, and then press the third key. Keyboard shortcuts provide an alternative to using the mouse and make it easy to perform repetitive commands.

If you're searching for new keyboard shortcuts in SharePoint 2013, just look for the letter: **K**. The **K** appears in the Keyboard Shortcuts table so you can quickly and easily identify new or changed shortcuts.

Keyboard Shortcuts	
Command	Windows
<b>All Pages</b>	
Turn More Accessible Mode on or off	Tab (Press repeatedly, immediately after you open the page in a browser)
Activate the Sky Ribbon Commands link	Alt+Y
Activate the View All Site Content link	Alt+3
Activate the Site Actions menu	Alt+F
Activate the Search box	Alt+S
Activate the Help link	Alt+6
Activate the Home link	Alt+1
Activate the Username menu	Alt+W
Expand menus for a list item	Shift+Enter
Move the selection from Web Part to Web Part	Alt+W
<b>Edit Rich Text</b>	
Apply or remove bold formatting from the selected text	Ctrl+B
Apply or remove italic formatting from the selected text	Ctrl+I

Additional content is available on the web. You can download keyboard shortcuts.

# Getting Started with SharePoint

---

## Introduction

Microsoft SharePoint 2013 is a web platform that allows you to:

- ◆ Provide a portal with a centralized place to access web services, such as websites, team sites, cloud storage drives, and databases.
- ◆ Provide a place to host web applications and websites.
- ◆ Provide social networking, blogs, wiki pages, and taxonomy to connect people with information.
- ◆ Administer projects online to manage people and track information.
- ◆ Work with content online to manage and collaborate on documents and database and other information.
- ◆ Search for content online with support for custom searches and metadata (information associated with data).
- ◆ Work with Microsoft Office 2013 to save documents SharePoint sites and create web applications.

SharePoint Server is a site that provides cloud storage, sharing, and tracking services hosted on a local network by an organization. Instead of setting up your own SharePoint server, you can use SharePoint Online, a subscription-based web site with SharePoint services that allows you to take advantage of expanded cloud capabilities.

You can access SharePoint using a web browser, such as Internet Explorer, Apple Safari, Google Chrome, and Mozilla Firefox. Even though SharePoint is a web-based platform, you can use SharePoint like an application. You can use familiar menus, ribbons, tabs, and commands—similar to Microsoft Office—to create and work with content in SharePoint.

## What You'll Do

**Introduce SharePoint**

**Understand How SharePoint Works**

**Prepare to Use SharePoint**

**Use SharePoint or Office 365 Sites**

**Access SharePoint**

**View the SharePoint Window**

**Get Around SharePoint**

**Use the SharePoint Ribbon**

**Choose SharePoint Commands**

**View and Edit SharePoint Settings**

**View and Edit Your Profile**

**Get Help and Online Support**

**Exit SharePoint**

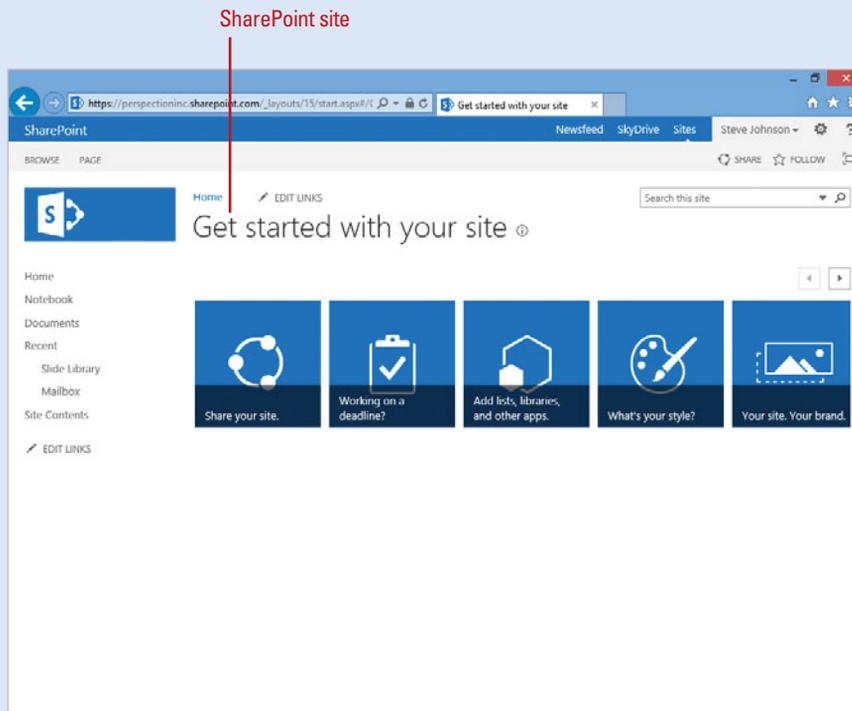
# Introducing SharePoint

SharePoint is a **web platform** instead of just a website. As a web platform, you can create, customize, manage, and maintain multiple sites—including websites—for multiple purposes. For example, you can develop and deploy sites for teams, blogs, projects, communities, publishing, and documents to name a few in SharePoint.

The great thing about SharePoint is that you don't have to be a web developer to use or create with it. SharePoint provides templates to help you quickly create sites and an easy to use web-based user interface to manage them. The trickiest part of working with SharePoint is setting up the server software and a SharePoint edition, which you can skip with SharePoint Online. For more information

about SharePoint editions and setup, see “Preparing to Use SharePoint” on page 4.

You can access and work with SharePoint using a web browser from any computer or device that has an Internet connection. You can access SharePoint as a visitor, user, or administrator based on your permissions. For example, a visitor can browse a website to view information, a user can access a Team site to collaborate on projects, or an administrator can maintain individual sites or develop the web platform in SharePoint. As a visitor, you can directly access a site using a web address. As a user or administrator, you can access SharePoint or a specific site based on your permissions using account credentials.



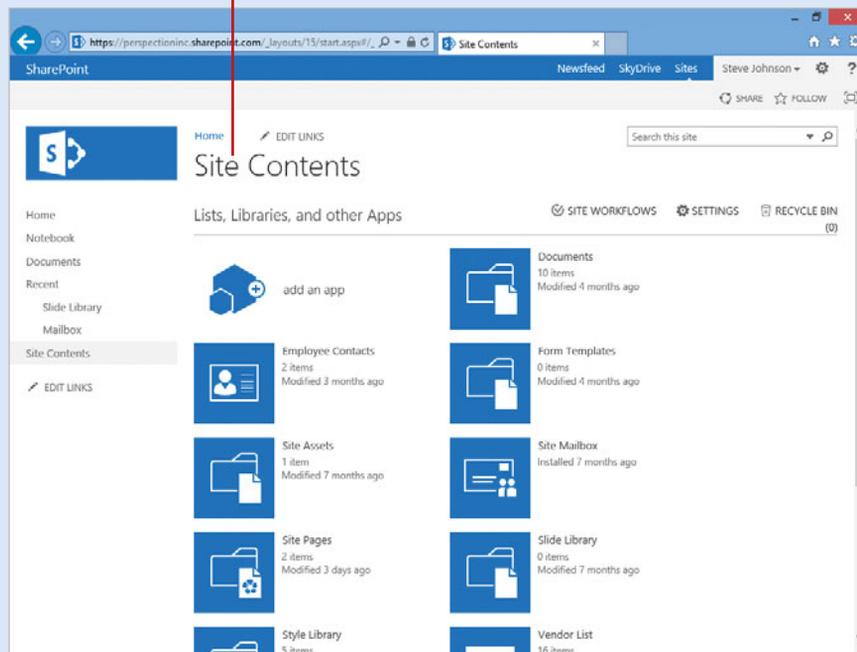
# Understanding How SharePoint Works

As a web platform, SharePoint provides the functionality you need to create solutions for organizations or even individuals. With all the functionality and features of SharePoint, it can be hard to figure out how it all works.

SharePoint is organized into three main areas: Newsfeed, SkyDrive, and Sites. With **Newsfeed**, you can follow people, documents, sites, and tags with SharePoint social networking (**New!**). With **SkyDrive**, you can manage, share, and work with documents using a SharePoint cloud with SkyDrive Pro (**New!**). With **Sites**, you can access different sites, such as Team site or Public (web) site, within SharePoint. In SharePoint, you can access Newsfeed, SkyDrive, and Sites from the Navigation bar at the top of the window.

Sites are the primary building blocks in SharePoint. You can create sites for the web, teams, blogs, projects, communities, publishing, and documents. A site consists of apps, lists, and libraries. Within a site, you can add pages and **web applications**, known as **apps**, with custom functionality to manage site contents. For example, you can add apps to work with contacts, tasks, a calendar, a discussion board, a survey, and announcements to name a few. There are two main types of apps, **lists** and **libraries**. A list allows you to manage and work with data, while a library is a specialized list that allows you to manage and work with files. You can download apps from the SharePoint app store or an organization's private site catalog.

SharePoint site contents



# Preparing to Use SharePoint

Before you can use Microsoft SharePoint, you need to decide whether you want to use a SharePoint local (on premise) edition or SharePoint online service.

## SharePoint Editions

SharePoint comes in two local editions and one online service:

- ◆ **SharePoint Foundation 2013** is an add-on component for Windows Server that provides the building blocks for the SharePoint Server edition. It includes a subset of SharePoint Server functionality that includes websites, web pages, web applications, mobile connectivity, and Office 2013 support.
- ◆ **SharePoint Server 2013** is a set of server applications that uses SharePoint Foundation 2013 as the base to provide a wider set of services. SharePoint Server 2013 comes in a Standard and Enterprise edition. In addition to the SharePoint Foundation 2013 features, the Standard edition includes portals, content management, searches, and social networking. The Enterprise edition adds even more: Excel, Access, and Visio services, workflow, and dashboards.
- ◆ **SharePoint Online** is a subscription-based web site with SharePoint services. It includes Newsfeed, SkyDrive, and SharePoint Team and public web sites.

Microsoft provides a SharePoint Online service called **Office 365** and packages it with Microsoft Exchange, Microsoft Lync, and Office Web App services with Outlook email, calendar, people, instant messaging, video/audio conferencing,

online meetings, and Office 2013 document editing. You can Microsoft is not the only company that offers SharePoint Online services. Other companies, such as fpweb.net, also offer the service.

## Deciding on a SharePoint Edition

SharePoint Foundation 2013 and SharePoint Server 2013 are installed on web servers and available on local networks and managed by network administrators, while SharePoint Online is provided and maintained by SharePoint service providers and available through the Internet. The functionality availability between SharePoint Server editions and SharePoint Online is nearly identical.

If you're a larger company with an IT staff that manages your network, and you want control over the contents of your site, then the SharePoint Server 2013 and/or SharePoint Foundation 2013 edition is the one for you. However, if you're an individual user or an employee in a small or large company and you don't want to purchase, install, and maintain the Windows and SharePoint server, then the SharePoint Online service is the one for you. After you sign up for the SharePoint Online service, you don't have to worry about installing, maintaining, backing up, monitoring or updating the web platform. All you need to do is pay your subscription dues. You can access the SharePoint Online service from any web browser with an Internet connection.

You can go to [www.microsoft.com](http://www.microsoft.com) or contact Microsoft for purchasing/licensing information for SharePoint Foundation 2013 and SharePoint Server 2013 or search the web for SharePoint service providers. For Microsoft Office 365, you can go to [www.office365.com](http://www.office365.com) for monthly subscription information.

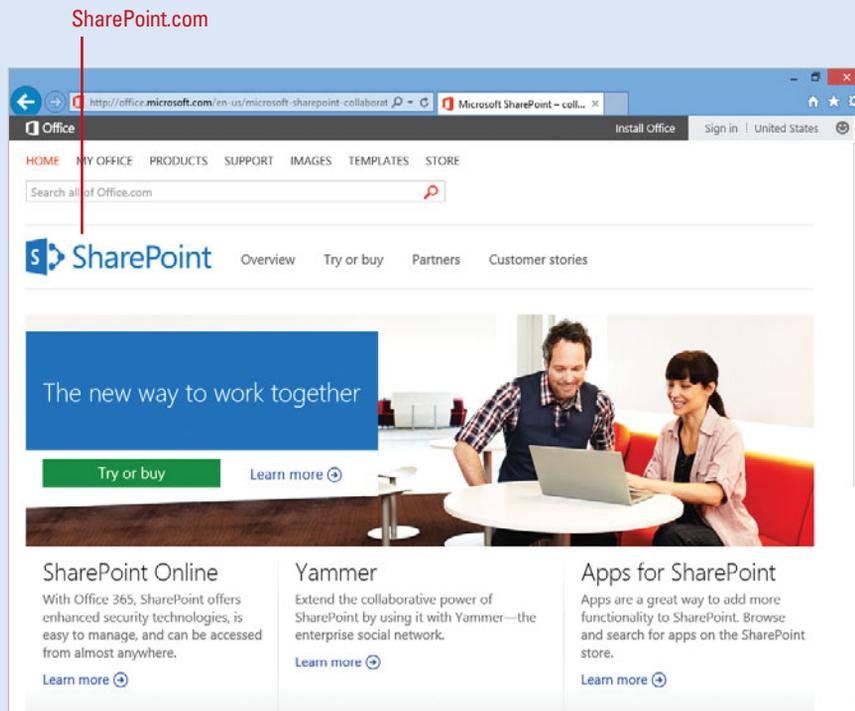
## Preparing for SharePoint

If you're going to use SharePoint Foundation 2013 and/or SharePoint Server 2013, you need to prepare a network server with the software SharePoint needs to work properly.

SharePoint is a web-based platform that requires a set of web technologies in order to work on a network server. Each technology builds (installs) on the next. The first one is Microsoft Windows Server, the base operating system for the network server. After you install Windows Server, the next ones are Microsoft SQL Server and Microsoft Internet Information Services (IIS). Microsoft SQL Server is a relational database management system, while Microsoft IIS is a web server application. Now, you're ready to install

SharePoint Foundation 2013, which is an add-on component that comes with Windows Server, and then SharePoint Server 2013, either the Standard or Enterprise edition. If you want to try out the software before you buy, you can go to [www.sharepoint.com](http://www.sharepoint.com) or [technet.microsoft.com](http://technet.microsoft.com) to download the software on a trial basis.

In addition to the standard functionality that comes with SharePoint Server, you can also purchase and install third party software to provide more features. For example, you can purchase and install Yammer ([www.yammer.com](http://www.yammer.com)) for the SharePoint Server 2013 Enterprise edition to add advanced social networking like Facebook and Twitter. The best way to find third party software for SharePoint is to search the web.



# Using SharePoint or Office 365 Sites

SharePoint Server is a site that provides cloud storage, sharing, and tracking services hosted on a local network by an organization. Instead of setting up your own SharePoint server, you can use SharePoint Online, such as Office 365, a subscription-based web site with SharePoint services that allows you to take advantage of expanded cloud capabilities.

## Using SharePoint Server

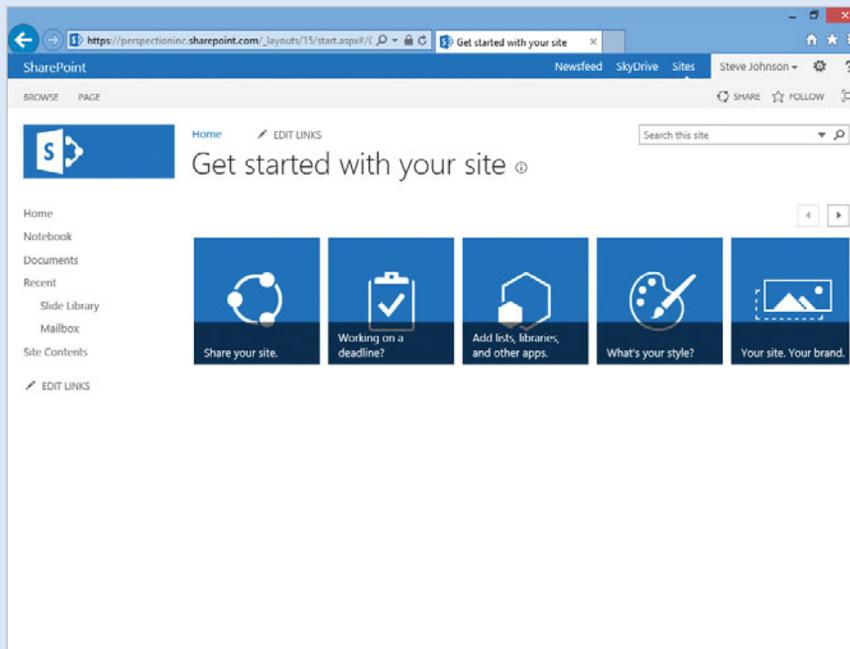
SharePoint Server comes with a standard set of services that includes Newsfeed, SkyDrive, and Sites along with extensive administrative Site settings. **Newsfeed** allows you to follow documents, sites and people to track what they are doing (**New!**) using social networking. **SkyDrive** allows you to view, manage,

and sync documents in a cloud with SkyDrive Pro (**New!**). SkyDrive Pro performs the same function for SharePoint sites as the stand-alone SkyDrive apps do for a personal SkyDrive. **Sites** allows you to access and create sites, such as Team Site or Public site, within SharePoint.

## Using Office 365

Office 365 is a Microsoft web site that combines SharePoint services with Microsoft Exchange, Microsoft Lync, Office Web App, and Admin services to create an enhanced solution. The additional services provide Outlook email, Calendar, and People, which are similar to and integrated with the apps in Windows 8. You can collaborate with instant

## SharePoint Site



messaging, video/ audio conferencing and online meetings with Lync. With Office Web Apps, you can create and edit Office 2013 documents online without Office 2013 desktop apps installed on your devices. However, if you want Office 2013 desktop apps, you can also download them from Office 365 along with integration tools (requires a premium subscription). You can access Office 365 at [www.office365.com](http://www.office365.com), where you can sign up for a subscription or trial.

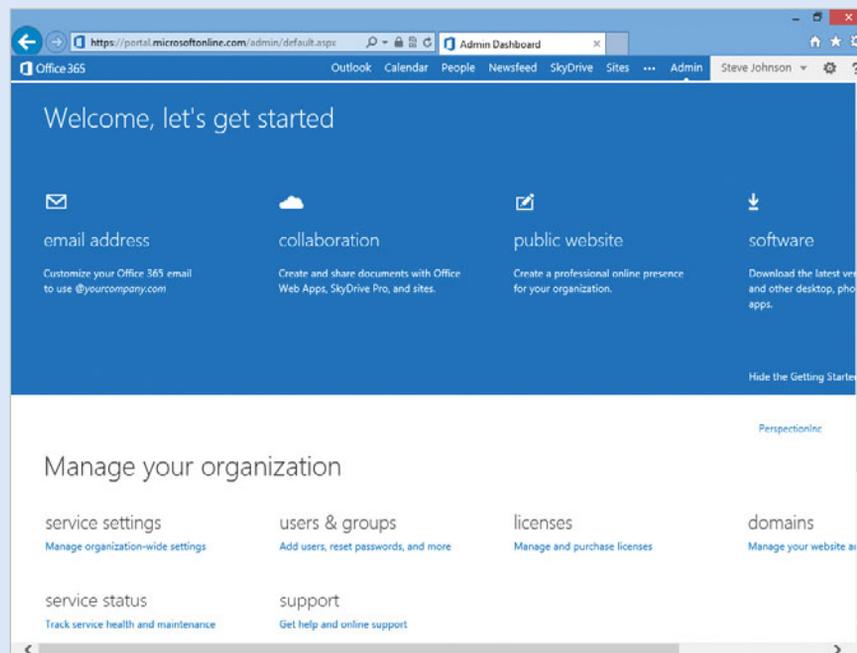
## Using SharePoint or Office 365 Sites

The common services—Newsfeed, SkyDrive, and Sites along with extensive administrative Site settings—provided by SharePoint Server and Office 365 (SharePoint Online) are nearly

the same, so you can use either product to create the solution you want. The major benefits of using Office 365 are expanded functionality—Outlook email, Calendar, People, and Admin along with Lync collaboration, and Office Web Apps—and easy access to the service as a subscription-based web site with no software installation and maintenance involved.

You can access SharePoint using a web browser, such as Internet Explorer, Apple Safari, Google Chrome, and Mozilla Firefox. Even though SharePoint is a web-based platform, you can use SharePoint like an application. You can use familiar menus, ribbons, tabs, and commands—similar to Microsoft Office—to work with content in SharePoint.

### Office 365 Site

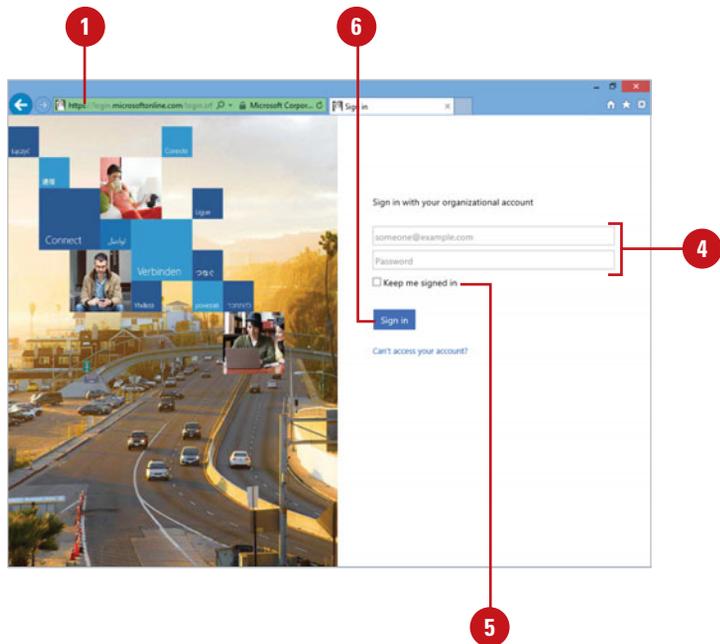


# Accessing SharePoint

SharePoint can be accessed from any computer or device that has an Internet connection. You can access SharePoint by entering the site address in your web browser. Before you can work with a SharePoint site, you need a SharePoint account to access the entire site or specified areas based on your site permissions. To get a SharePoint account, you need to contact your SharePoint site administrator or sign up for Office 365, a SharePoint Online site. Depending on your Admin settings, you can access SharePoint on multiple computers at the same time.

## Access a SharePoint Server Site in a Web Browser

- 1 Open your web browser, and then go to your SharePoint server address.
  - ◆ Contact your network administrator for the server address.
- 2 If prompted, use the following sign in instructions to access the server.
- 3 Click the **Sign in** link.
- 4 Enter your User ID and Password for your SharePoint server.
- 5 Select the **Keep me signed in** check box to speed up sign in process in the future. However, it allows others who have access to your computer to sign in.
- 6 Click **Sign in**.
- 7 To sign out, click the **Username** on the toolbar, and then click **Sign out**.



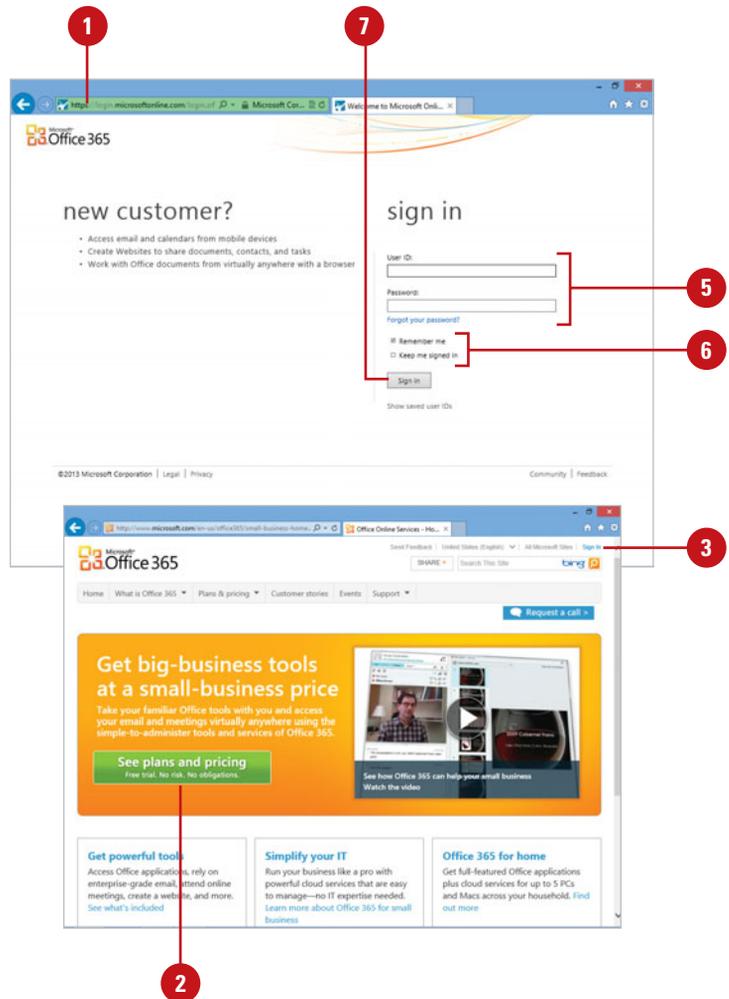
## Access the Office 365 Site in a Web Browser

- 1 Open your web browser, and then go to [www.office365.com](http://www.office365.com).
- 2 If you don't have an account, click the link to get a free trial. Follow the online instructions to create the account.
- 3 Click the **Sign in** link.
- 4 If prompted, click the **Microsoft account** or **Organizational account** link.
  - ◆ The Microsoft account is for personal use, while the Organizational account is for work, school, or organization use.
- 5 Enter your User ID and Password for your Office 365 account.
- 6 Select the **Remember me** and/or **Keep me signed in** check boxes to speed up sign in process in the future. However, it allows others who have access to your computer to sign in.
- 7 Click **Sign in**.

Your Office 365 SharePoint site appears in your web browser.
- 8 To sign out, click the **Username** on the toolbar, and then click **Sign Out**.

### Did You Know?

**You can add your SharePoint account to Office 2013.** After you establish a SharePoint account, you can add it to your Microsoft account in a Office 2013 program (**New!**) to work seamlessly with SharePoint online services.

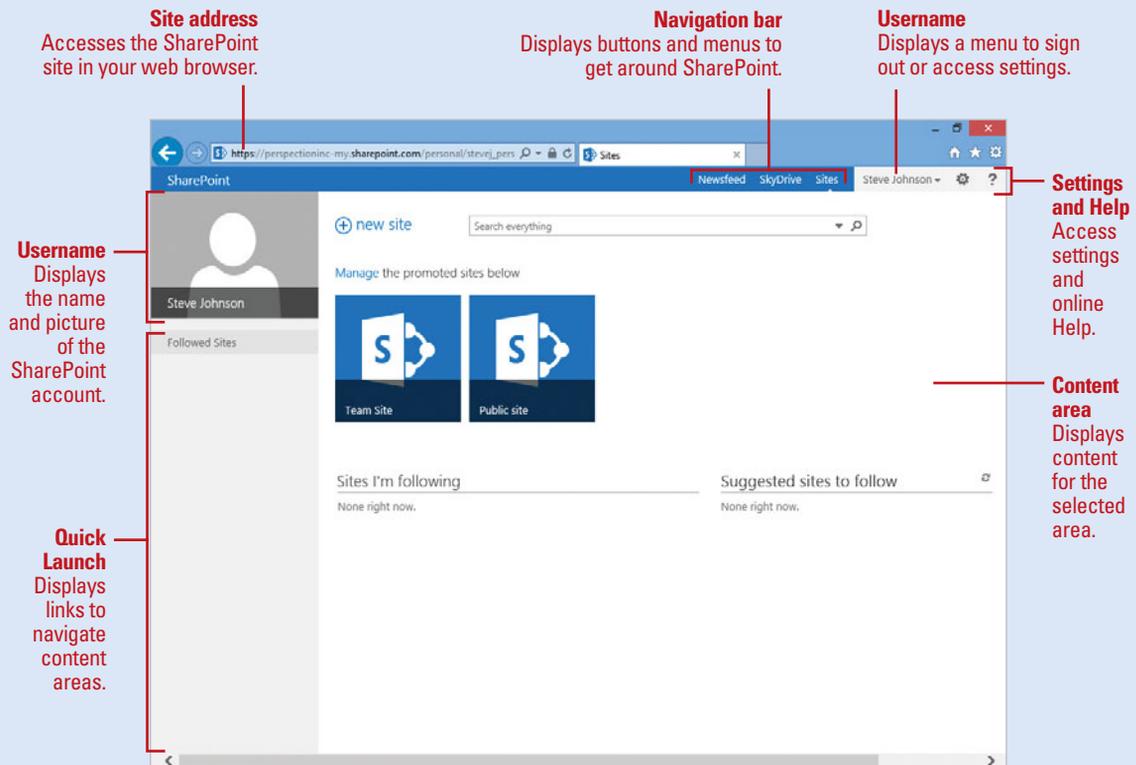


# Viewing the SharePoint Window

After you access SharePoint from your web browser, you can get acquainted with the site by viewing the SharePoint window. At the top of the window is the Navigation bar that allows you to access and manage sites and content in SharePoint. SharePoint comes with the following options on the Navigation bar:

- ◆ **Newsfeed.** Allows you to follow documents, sites and people to track what they are doing (**New!**).
- ◆ **SkyDrive.** Allows you to view, manage, and sync documents in a cloud with SkyDrive Pro (**New!**).
- ◆ **Sites.** Allows you to access and create sites, such as Team Site or Public site, within SharePoint.
- ◆ **Username.** Displays a menu with commands to sign out, access your profile, or personalize the current page.
- ◆ **Settings.** Displays a menu with commands to add an app, view site contents, and access site settings.
- ◆ **Help.** Opens a window with online SharePoint Help.

## SharePoint Site



Along with the SharePoint options, Office 365 also comes with the following additional options on the Navigation bar:

- ◆ **Outlook.** Allows you to access email from your SharePoint account using Outlook Web App with Exchange.
- ◆ **Calendar.** Allows you to access a calendar from your SharePoint account using Outlook Web App with Exchange.
- ◆ **People.** Allows you to access and manage contact information from your SharePoint account using Outlook Web App with Exchange.

- ◆ **Admin.** Allows you to set options for service settings, users & groups, licenses, and domains (website and email) to name a few.

Along the left side of the window is the **Quick Launch** bar with navigation links, which provide easy access to area specific content within SharePoint. The Navigation links vary depending on the content specific area. For example, when you display a Team Site, the Navigation links include Home, Notebook, Documents, Recent, and Site Contents. There is also an option to Edit Links.

## Office 365 Site

The screenshot shows a web browser displaying a SharePoint site. Red lines and text boxes point to specific features:

- Site address:** Points to the URL in the browser's address bar: `https://perspectioninc-my.sharepoint.com/personal/steve_pers_0`.
- Office 365 Navigation:** Points to the top navigation bar containing links for Outlook, Calendar, People, Newsfeed, SkyDrive, Sites, and Admin.
- SharePoint Navigation:** Points to the top navigation bar, specifically the 'Sites' and 'Admin' links.
- Username:** Points to the user profile area on the left, showing the name 'Steve Johnson' and a placeholder picture.
- Quick Launch:** Points to the left-hand navigation pane, which lists 'My Documents', 'Followed Documents', and 'Recent Documents'.
- Settings and Help:** Points to the gear icon and question mark icon in the top right corner of the page.
- Content area:** Points to the main content area, which displays a 'Documents' library with a table of files.

Name	Modified	Sharing	Modified By
Pictures	January 21	...	Steve Johnson
Scenes	January 21	...	Steve Johnson
Shared with Everyone	November 30, 2012	...	Steve Johnson
Customer Letter	January 31	...	Steve Johnson
Loan Amortization	January 31	...	Steve Johnson
Strategy	January 31	...	Steve Johnson

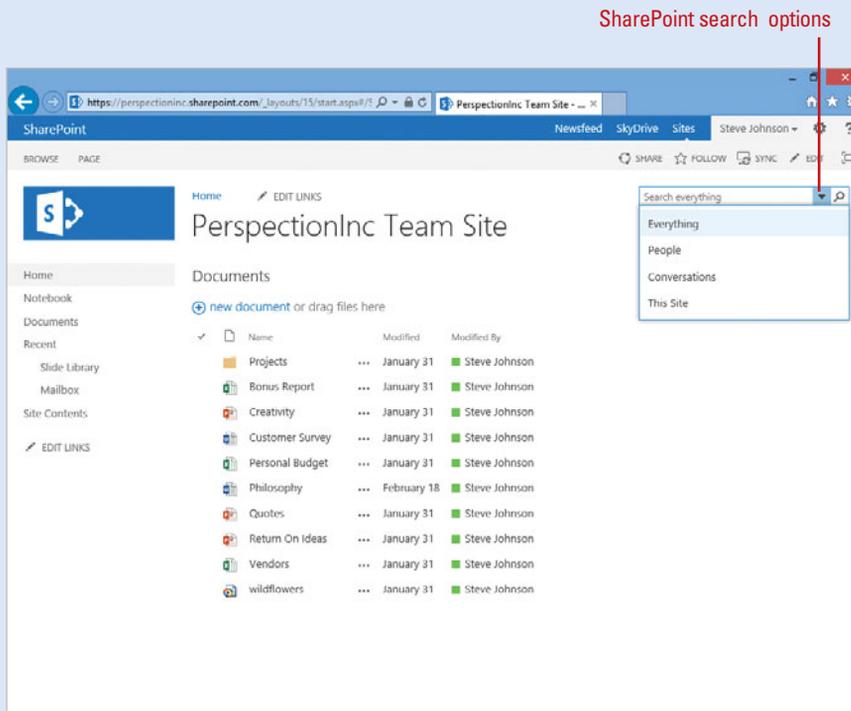
# Getting Around SharePoint

After you access SharePoint using your web browser, you can use the Navigation bar at the top of the window or the Quick Launch bar on the left side of the window to quickly get around SharePoint. However, as you navigate from link to link within sites or pages, you may find yourself with no way back to where you started. This is where the Back button in your web browser can help you out.

If the default navigation is not enough for you, you can use Site Settings to enable/disable or customize navigation. For example, if you prefer a Tree View, like the one in File Explorer (Win) or Finder (Mac), you can enable the option in Site Settings under Tree View to display it under the Quick Launch bar. See “Viewing and Editing SharePoint Settings” on page 15 for more information.

## Searching in SharePoint

If you have a hard time finding things in SharePoint, you can use the Search box to help you locate it. Simply, enter the information you want to find, and then press Enter, or click the Search button (Magnifying Glass icon). If you want to perform a more focused search, you can select a search option. In the Search box, click the Navigation list arrow, and then select an option: Everything, People, Conversations, or This Site. In the results page, a brief portion of the search results content appears in a list. You can click a link to open the item, or point to a item to display a callout window with information and options. If you want to refine the search, you can use the Search box or filter links.



# Using the SharePoint Ribbon

The **Ribbon** is a results oriented way of working with content in SharePoint. If you're familiar with Office 2007 or later, then you've already gotten a head start using the Ribbon. The Ribbon is located below the Navigation bar on the left side and is comprised of **tabs** that are organized by task or objects. The controls on each tab are organized into **groups**, or subtasks. The controls, or **command buttons**, in each group execute a command, or display a menu of commands or a drop-down gallery. Controls in each group provide a visual way to quickly make document changes. When you click a tab, the Ribbon appears below it. The Ribbon stays in place until you click something else. If you're not sure what a button or option on the Ribbon does, you can point to it, which displays a tooltip with a brief description of what it does.

## Tabs

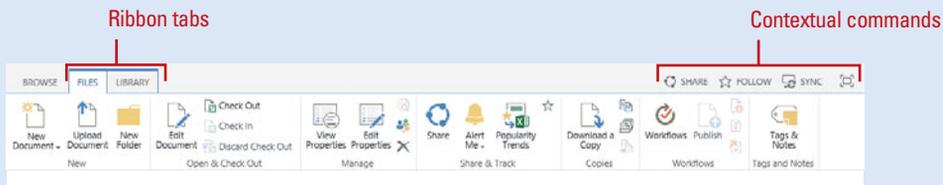
The tabs on the Ribbon are contextual, meaning they appear only when they are needed based on the type of task you are doing or the page you are displaying. SharePoint recognizes what you're doing and provides the right set of tabs and tools to use when you need them based on the display and need. For example, when you display a site, the Browse and Page tabs appear. The Browse tab is the standard tab that always appears and displays the contents of the site, while the Page tab displays commands that allow you

to edit, manage, share & track, add tags and notes, and work with site pages. When you display a list or library within a site, such as a Document Library, the Files and Library tabs appear. The Files tab displays commands that allow you to create open & check out, manage, share & track, copy, add tags and notes, and work with site documents, while the Library tab displays commands that allow you to view formats, manage views, share & track, add tags and notes, connect & export, and customize site libraries.

## Commands

Below the Navigation bar on the right side are contextual commands (like tabs) that appear based on the display and need. The contextual commands vary depending on the display and include the following:

- ◆ **Share.** Allows you to let others to access the current page.
- ◆ **Follow.** Allows you to get updates about the current site or document in your newsfeed.
- ◆ **Sync.** Allows you to create a local copy of SharePoint content on your computer using SkyDrive Pro.
- ◆ **Edit.** Allows you to edit the current page.
- ◆ **Focus on Content.** Allows you to remove some of the navigation elements on the page, such as the Quick Launch bar, in order to simplify the layout.



# Choosing SharePoint Commands

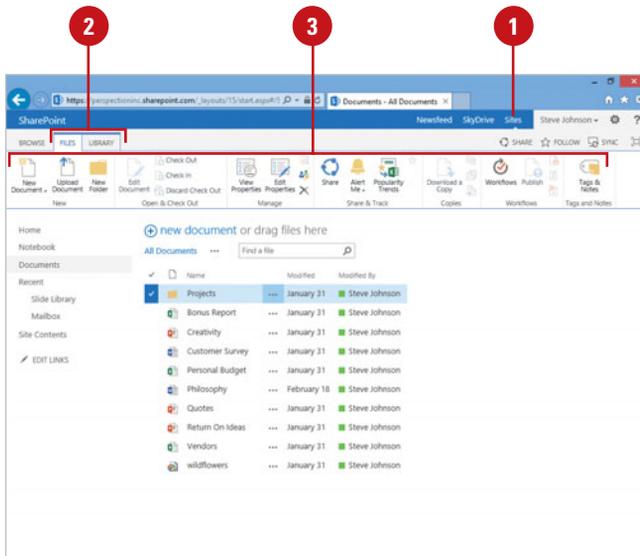
## Choose a Command Using Tabs

- 1 Navigate to the page, such as a site or SkyDrive, with one or more tabs on the Ribbon.
- 2 Click a tab, such as Page, Files, or Library on the Ribbon.

The Ribbon displays like a menu.

- ◆ To cancel the Ribbon, click the Browse tab.
- 3 Click the button command you want. If a menu appears, click a command.

SharePoint commands are displayed as buttons and links, and organized in groups on menus and tabs. When you click a menu or tab, commands appear in a list on a menu or as buttons on the Ribbon. If an ellipsis (. . .) appears next to an item, you can click it to display more options. When you click an ellipsis (More Options), a menu appears with commands or a **callout window (New!)** appears with a preview (**New!**), information about the item, and contextual commands, such as Open or Share, and even an ellipsis with more menu commands.

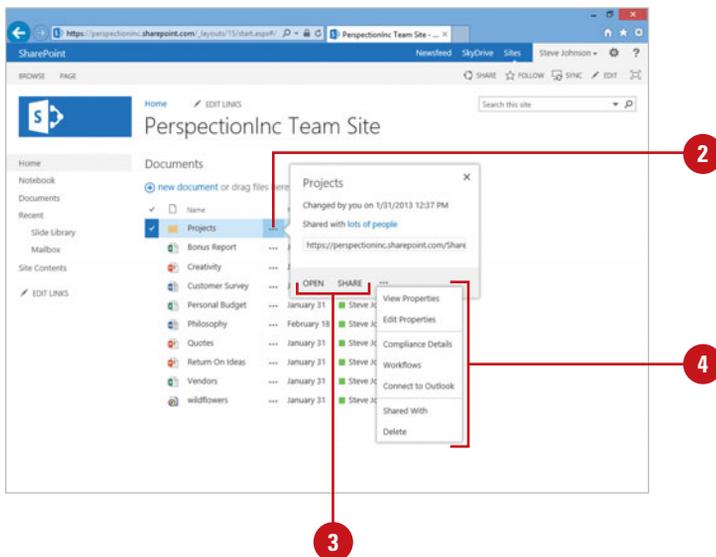


## Choose a Command Using a Callout Window

- 1 Navigate to the page with an ellipsis (. . .) button.
- 2 Click the ellipsis (. . .) button for the item you want to work with.

A callout window appears with information and options.

- 3 Click the command you want.
- 4 If an ellipsis (. . .) button is available on the callout window, click it to display a menu with additional commands.

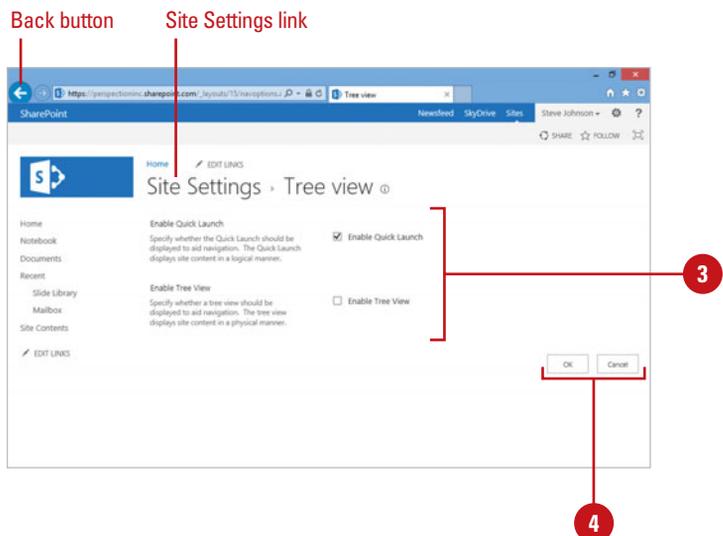
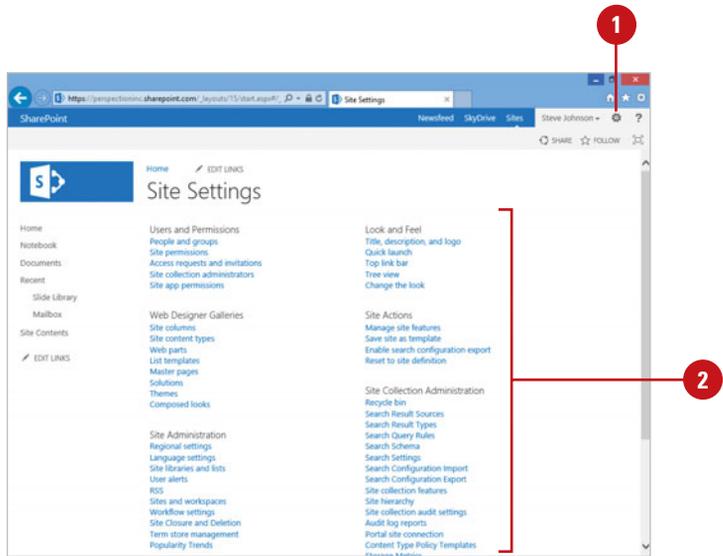


# Viewing and Editing SharePoint Settings

## View and Edit SharePoint Site Settings

- 1 Click the **Settings** button (Gear icon) on the Navigation bar, and then click **Site settings**.
- 2 Click a link for the settings you want to view and edit.
  - ◆ **Setting ToolTip.** Point to a link to display a tooltip with a short description of the option.
- 3 View the settings, and then make any changes as desired. Click any additional links as needed.
- 4 Return to the Site Settings page using one of the following:
  - ◆ **Button.** Click **OK** to accept the changes or click **Cancel** to revert back.
  - ◆ **Site Settings Link.** Click the **Site Settings** link.
  - ◆ **Back Button.** Click the **Back** button in your web browser.

The key to SharePoint is the ability to customize the web platform to display the information you want, the way you want, and to whom you want. The combination of security and customization gives you the flexibility to build a solution to meet your specific needs. You can customize SharePoint by changing Site Settings, which consists of over 50 links organized into the following categories: Users and Permissions, Web Designer Galleries, Site Administration, Search, Look and Feel, Site Actions, and Site Collection Administration. There are a lot of settings in SharePoint. Don't get overwhelmed by the number of settings, just focus on the ones you need as you work in SharePoint. Also, thoroughly testing your sites will reveal your need to set settings in SharePoint.



# Viewing and Editing Your Profile

## View and Edit Your Profile

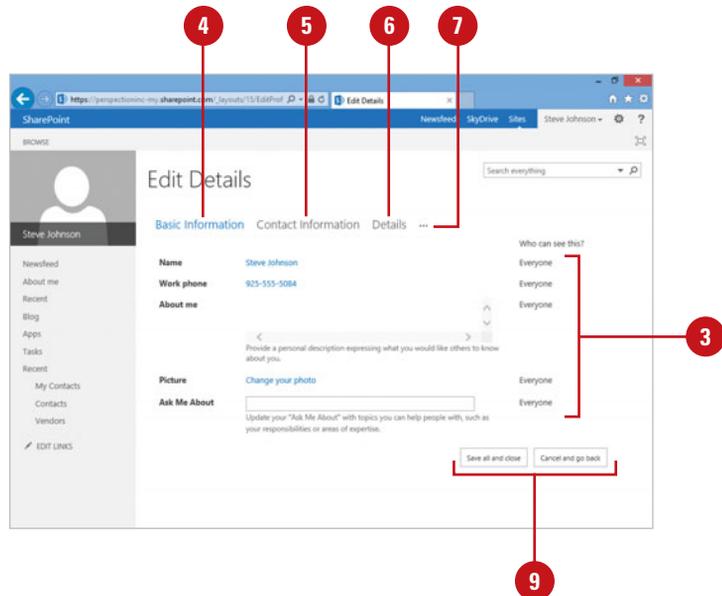
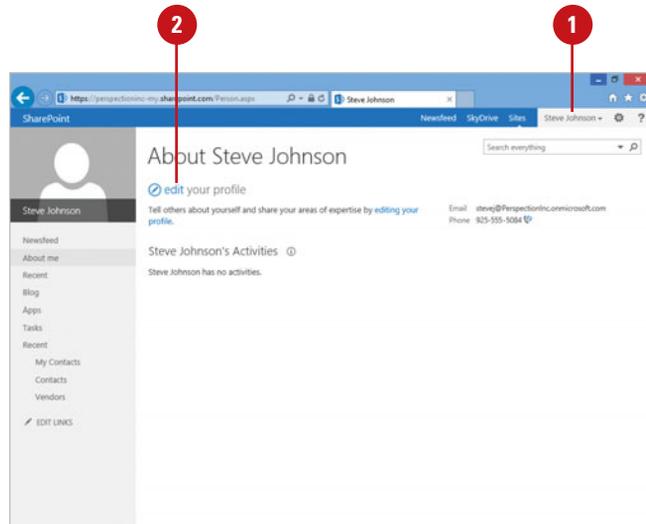
- 1 Click the **Username** on the Navigation bar, and then click **About Me**.

**TIMESAVER** Click your profile picture to view your profile.

Your current profile appears on the About page.

- 2 Click the **edit** link.
- 3 As you specify information in your profile, click a **Show To** list arrow (as available), and then click **Everyone** or **Only Me**.
- 4 Click the **Basic Information** link, and then enter the requested personal information.
- 5 Click the **Contact Information** link, and then enter the requested contact information.
- 6 Click the **Details** link, and then enter the requested background information.
- 7 To display a link for Newsfeed Settings or Language and Region, click the ellipsis (...) button, and then click the command you want.
- 8 Click the Newsfeed Settings or **Language and Region** link, and then specify the options you want.
- 9 When you're done, click the **Save all and close** button.

A SharePoint user profile allows you to enter and provide information about yourself for others to search and view. In your profile, you can enter basic information (name, phone, description, picture, and expertise), contact information, and background details (past projects, skills, schools, birthday and interests). In addition to information, you can also specify Newsfeed settings (**New!**) and language and region preferences. As you enter information and set options in your profile, you can specify whether you want to show it to everyone or only me. When you tag something to follow under Newsfeed, the information also appears under Activities in your profile.



## Change Your Profile Picture

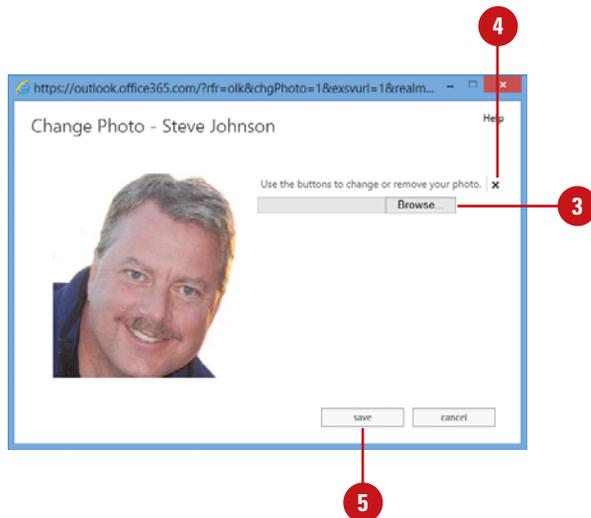
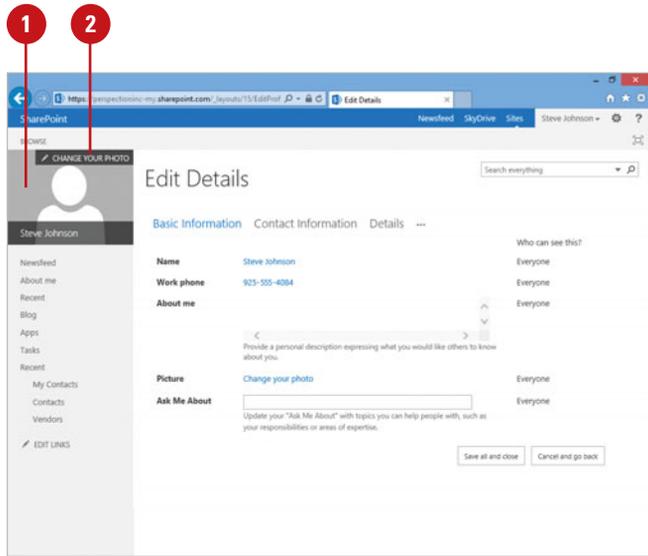
- 1 Point to your profile placeholder or picture on any page to display an option at the top of it.
  - ◆ You can also click the **Username** on the Navigation bar, click **About Me**, and then click the **edit** link.
- 2 Click the **Chance Your Photo** link.

An Account Information window appears with options to change your photo.
- 3 To change your photo, click **Browse**, navigate to and select the image file, and then click **Open**.
- 4 To remove your photo, click the **Remove** button.
- 5 When you're done, click **Save**.

### See Also

See "Changing Newsfeed Settings" on page 294 for more information on setting Newsfeed options.

See "Changing Language and Regional Settings" on page 54 for more information on setting language preferences, time zone, and region options.

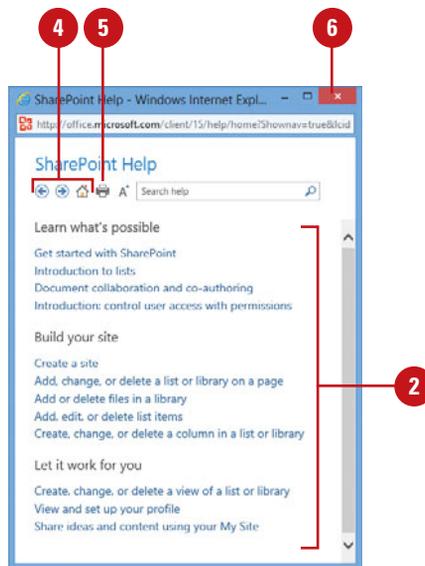


# Getting Help While You Work

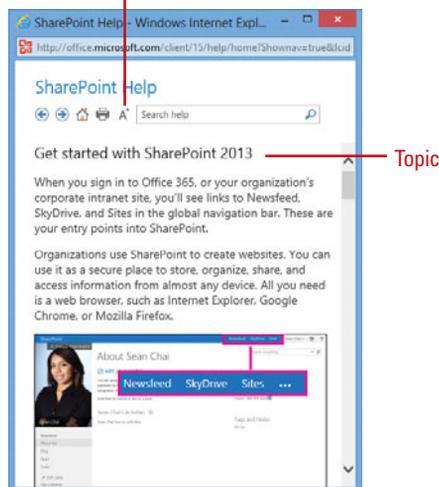
## Use SharePoint Help to Get Answers

- 1 Click the **Help** button on the Navigation bar.
- 2 Click a topic link on the home page.
- 3 Read the topic, and then click any links to get Help information.
  - ◆ If the topic is hard to read, click the **Use Large Text** button to increase the font size. To reduce the size, click the Use Large button again.
- 4 Click the **Back**, **Forward**, and **Home** buttons to move around in the Help Viewer.
- 5 If you want to print the topic, click the **Print** button.
- 6 When you're done, click the **Close** button.

At some time, everyone has a question or two about the program they are using. SharePoint Help provides the answers and resources you need, including feature help, articles, tips, videos, and online support from Microsoft. The web browser Help Viewer allows you to browse a catalog of topics to locate information or enter your own phrases to search for information. When you use any of these help options, a list of possible answers is shown to you with the most likely answer or most frequently-used at the top of the list. You can use the Back, Forward, and Home buttons to move around in the Help Viewer. If a topic is too small to read, you can use the Use Large Text button to change the font size. If you want to print a topic, you can use the Print button.



Click to change the topic font size



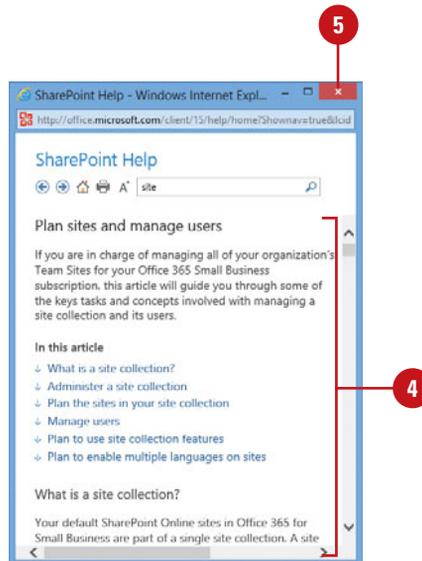
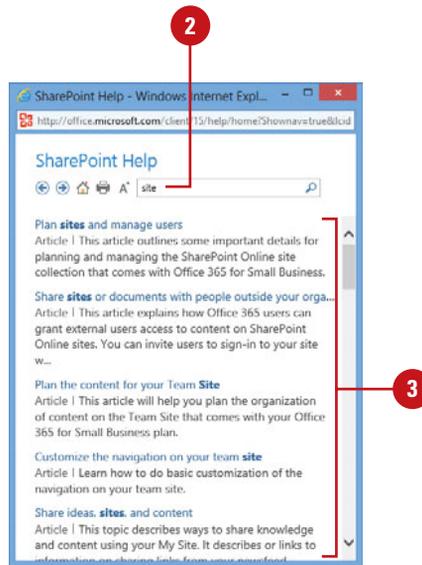
## Search for Help

- 1 Click the **Help** button on the Navigation bar.
- 2 Type one or more keywords in the Search box, and then click the **Search** button to display results.
  - ◆ **Prev or Next.** Scroll to the bottom, and then click **Prev** or **Next** to view more results.
- 3 Click a topic.
- 4 Read the topic, and then click any links to get information on related topics or definitions.
- 5 When you're done, click the **Close** button.

### Did You Know?

**You can get help for Outlook Web App in Office 365.** For Outlook, Calendar, and People in Office 365, SharePoint uses Outlook Web App. To get help for Outlook Web App, click the Help button, and then click Help.

**You can make help collections available for a site.** For a site collection, you can make help collections, such as SharePoint, Central Administration, Project Web App, Teacher, or Student, available for users to access. Navigate to the top level site for the collection, click the Settings button (Gear icon), click Site settings, click the Help settings link under Site Collection Administration, select the check boxes for the Help collections you want, and then click OK.



# Exiting SharePoint



When you're done working in SharePoint, you can exit by signing out of the SharePoint site and then exiting your web browser. It's important to sign out of SharePoint, especially if you're using a nonsecure computer, so that no one else can get access to your site and make changes. Your web browser remains open until you exit the program. If you exit your web browser without signing out of SharePoint, you're automatically signed out of SharePoint.

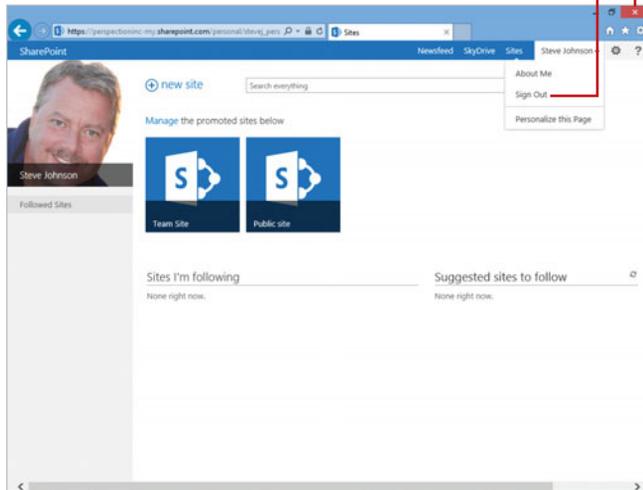
## Sign Out SharePoint

- ◆ **From SharePoint.** Click the **Username** on the Navigation bar, and then click **Sign out**.

Your web browser remains open until you exit it.

- ◆ **From Web Browser.** Click the **File** (Win) or **Program Name** (Mac), and then click **Exit** (Win) or **Quit** (Mac).

Sign out of SharePoint    Exit browser



# Touring a SharePoint Site

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## Introduction

Before you get started creating a SharePoint site, let's take a tour of an existing site to give you a perspective on what you can do with SharePoint. You'll take a look at the different aspects of a SharePoint site and Office 365, so you can view and understand the various features available for each one.

SharePoint Server comes with a standard set of services that includes Newsfeed, SkyDrive, and Sites along with extensive administrative Site settings. Newsfeed allows you to follow documents, sites and people to track what they are doing using social networking. SkyDrive allows you to view, manage, and sync documents in a cloud with SkyDrive Pro. SkyDrive Pro performs the same function for SharePoint sites as the stand-alone SkyDrive apps do for a personal SkyDrive. Sites allows you to access and create sites, such as Team Site or Public site, within SharePoint.

Office 365 is a Microsoft web site that combines SharePoint Online services with Microsoft Exchange, Microsoft Lync, Office Web App, and Admin services to create an enhanced solution. The additional services provide Outlook Email, Calendar, and People, which are similar to and integrated with the apps in Windows 8.

The common services provided by SharePoint Server and Office 365 (SharePoint Online) are nearly the same, so you can use either product to create the solution you want. The major benefits of using Office 365 are expanded functionality and easy access to the service as a subscription-based web site with no software installation and maintenance involved.

## What You'll Do

**Explore SharePoint Sites**

**Open a SharePoint Site**

**Tour a Team Site**

**Tour a Public Website**

**Tour SkyDrive**

**Tour Newsfeed**

**Tour People Contacts**

**Tour Calendar**

**Tour Outlook Email**

**Tour Admin Settings**

# Exploring SharePoint Sites

SharePoint comes with a variety of different types of sites, such as a team, web, blog, and document center.

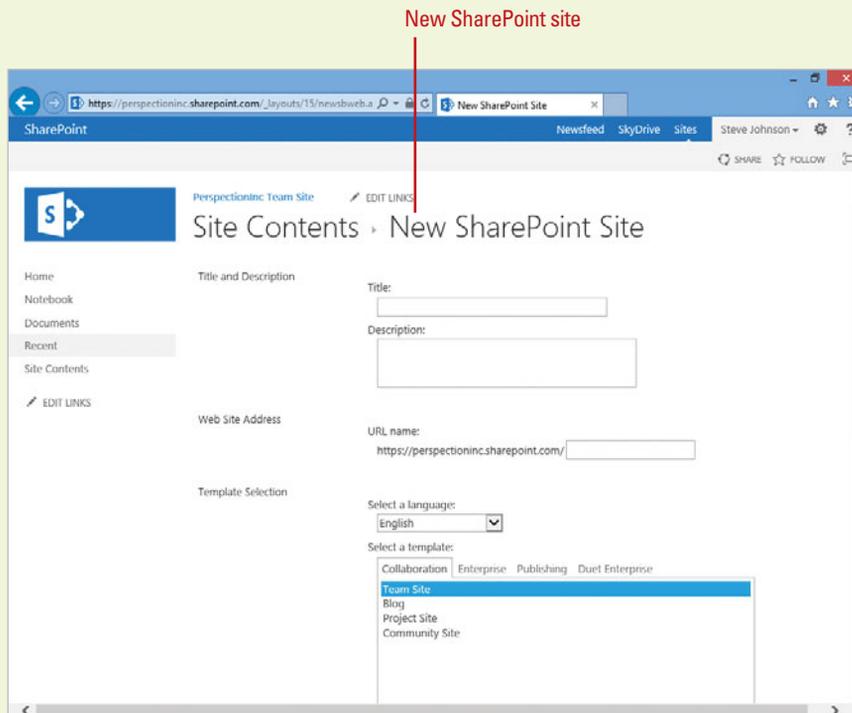
A **site** is a group of related web pages and apps where users can collaborate on projects and share information. Each site can include multiple **subsites** and pages that relate to the main site. A subsite can also include its own subsites and pages. A main site and its group of subsites and pages is called a **site collection**, which create a hierarchy or levels. The main site, also known as the **top-level site**, requires administration permissions in order to manage it. When you create a subsite, it inherits the permissions, navigation, and appearance of the parent site, the site from which you created it.

You can access sites in SharePoint by clicking Sites on the Navigation bar. From the Sites page in SharePoint, you can access individual sites or create new ones.

## Exploring SharePoint Types

You can create a site by using a SharePoint site template. The template provides the base functionality for the site, which you can add or remove features to customize it.

SharePoint organizes templates into three main categories: Collaboration, Enterprise, and Publishing. However, category and template availability vary based on your SharePoint installation.



The Collaboration category provides the following templates:

- ◆ **Team Site.** A site for teams to collaborate, organize, create, and share information and documents.
- ◆ **Blog.** A site for users and groups to write opinions and share information.
- ◆ **Developer Site.** A site for developers to build, test, and publish apps for Office.
- ◆ **Project.** A site for users to manage and collaborate on a project.
- ◆ **Community.** A site for community members to explore and discuss common topics.

The Enterprise category provides the following templates:

- ◆ **Document Center.** A site for users to store and manage documents.
- ◆ **eDiscovery Center.** A site (**New!**) for users to manage, search, and export content for investigations. You can place content on hold (during litigation or investigations, for example), conduct queries, and export content.
- ◆ **Records Center.** A site for users to submit and find documents that should be stored for long term archival.
- ◆ **Business Intelligence Center.** A site (**New!**) for users to access Business Intelligence content with enhancements in Excel Services and PerformancePoint Services, and support for mobile devices such as Apple iPad and Windows 8 tablets.
- ◆ **Enterprise Search Center.** A site (**New!**) for users to access the enterprise search center to perform general, people, and conversation or video searches.

- ◆ **My Site Host.** A site for users to host public profile pages and personal sites.
- ◆ **Community Portal.** A site (**New!**) for users to discover and work with multiple enterprise communities.
- ◆ **Basic Search Center.** A site (**New!**) for users to access basic search capabilities.
- ◆ **Visio Process Repository.** A site for users to share and view Visio process diagrams.

If available, the Duet Enterprise category provides the following templates:

- ◆ **SAP Workflow Site.** A site for users to manage workflows for business tasks.

The Publishing category provides the following templates:

- ◆ **Publishing Site.** A site for users to create an internet-facing sites or large intranet portals.
- ◆ **Enterprise Wiki.** A site for users to publish and share information across an enterprise.
- ◆ **Product Catalog.** A site for users to manage product catalogs.

## Creating SharePoint Sites

During a SharePoint server installation, you create some sites, such as Team Site and Public site. However, once everything is set up and you have the right permissions, you can still create a site in SharePoint. In addition, you can create a subset under an existing site and apply a template.

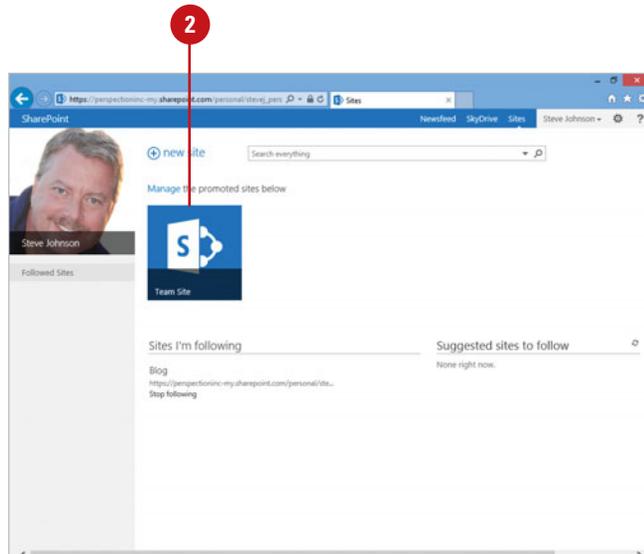
# Opening a SharePoint Site

## Open a SharePoint Server Site in a Web Browser

- 1 Open your web browser.
- 2 In the Address bar, enter the main or direct address.
  - ◆ **Main Address.** Go to your SharePoint server address, click **Sites** on the Navigation bar, and then click the site name.
  - ◆ **Direct Address.** Go to the direct SharePoint site address. For example, *https://sharepoint address/site name*.
- 3 If prompted, click the **Sign in** link, enter your User ID and Password for your SharePoint server, and then click **Sign in**.

Your SharePoint site appears in your web browser.

A SharePoint site can be accessed from any computer or device that has an Internet connection. You can access SharePoint by entering the complete address to the direct site in your web browser. If you have read permission to the site, the site opens to the URL. If you don't have permission, you'll need to enter a User ID and password to access the site, which you can get from your SharePoint site administrator or sign up for Office 365.



## Open an Office 365 Site in a Web Browser

- 1 Open your web browser.
- 2 In the Address bar, enter the main or direct address.
  - ◆ **Main Address.** Go to [www.office365.com](http://www.office365.com), click **Sites** on the Navigation bar, and then click the site name.
  - ◆ **Direct Address.** Go to the direct Office 365 SharePoint site address. For example, <https://sharepoint.com> site name
- 3 If prompted, click the **Sign in** link, enter your User ID and Password for your Office 365 account, and then click **Sign in**.

Your Office 365 SharePoint site appears in your web browser.

