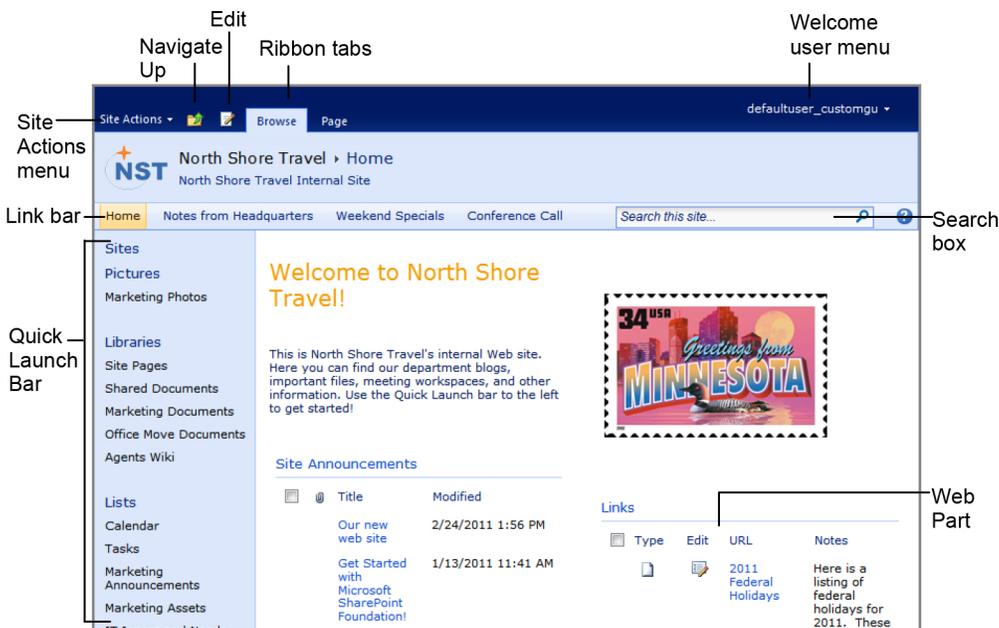


SharePoint Foundation 2010

Document Collaboration Quick Reference Guide



SharePoint Team Site



This image displays the home page of the North Shore Travel team site as it appears to a user with Full Control (a member of the Site Owner group). The Web page is composed of Web Parts, which can be customized and changed as necessary by users with the right permissions.

Quick Launch

Sites

Collaboration areas such as team sites, workspaces and blog sites. Important subsites may also appear in the Quick Launch.

Libraries

Includes libraries that contain related files, such as documents, wiki sites, and forms.

Lists

Store shared information here, such as events on a calendar or project tasks.

Discussions

Participate in group discussions using discussion boards.

Recycle Bin

Deleted information is stored here.

All Site Content

View all sites, lists, and libraries in the site.

Surveys

Create a new survey, or respond to a survey and view its results.

Pictures

Picture libraries are the best way to store shared images. Include commands and options specific to images.

Groups

People and groups with permission to view or work with the site appear here.

Permission Levels

Full Control: All permissions are included. Users with this permission level have complete control over everything in the site. *Site Owners* are given this permission level by default.

Design: Create many things, including lists and document libraries. Also edit pages and change the appearance of the site by applying themes or style sheets.

Contribute: Add, edit, and delete items in existing lists and document libraries. *Site Members* are given this permission level by default.

Read: Read-only access to the Web site. View items and pages, open items and documents. *Site Visitors* are given this permission level by default.

Limited Access: This is a special permission level that gives access to a specific list, item, or document, without giving them access to the entire site.

The Fundamentals

- There are four main tools for navigation in a SharePoint site:

Link Bar: This includes the tabs that appear along the top of the site. Subsites of the current site usually appear as tabs on the link bar. To go to a site, click its tab on the Link Bar.

Quick Launch Bar: Navigate to items on the current site, such as shared documents, and libraries, such as picture and slide libraries.

Breadcrumb Navigation: Breadcrumb navigation displays links to where you have been, and where the current page fits in the hierarchy of sites and items in the site.

Navigate Up: Click this button to navigate back to the Home page from any SharePoint subsite.

- To Navigate in a SharePoint Site:** SharePoint sites work just like any other site on the Internet: click a hyperlink to view the page or item to which it is connected.
- To View All Content in the Current Site:** Click the **All Site Content** link at bottom top of the Quick Launch Bar.
- 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 **Library**, **List**, or **Calendar** tab on the Ribbon and click the **Current View** list arrow in the Manage Views group. Select the view you want to use.

- To Sign Out:** Click the **Welcome (User)** menu at the top of the screen and select **Sign Out**.

- To Sign In as a Different User:** Click the **Welcome (User)** menu at the top of the screen and select **Sign in as Different User**. Enter the different user information in the dialog box.

- To Change User Settings:** Click the **Welcome (User)** menu at the top of the screen and select **My Settings**. Click the **Edit Item** link on the toolbar and attach a file with updated user settings.

- To Get Help:** Click the **Help** button in the top right corner of the SharePoint site page.

- Understanding Permissions:** Each user that has access to a site is assigned a permissions level. The permissions level limits the amount of control the user has in the site. See the list on the right side of the page for more information about the five permission levels in SharePoint.

Documents

- **Document Library vs. Document Workspace:** These are the two primary ways to work with documents on a SharePoint site. A document library lets users share, collaborate, collect, and manage files with others. A document workspace has tools to help a team develop and prepare one or more documents.
- **To Open and Edit a Shared Document:** Click **Documents** on the Quick Launch bar and click the library containing the document you want to open or edit. Click the document. In the dialog box that appears, click **Read Only** to open the document, click **Edit** to edit the document.
- **To Check Out a Document:** Click **Libraries** on the Quick Launch bar and click the library containing the document you want to check out. Point to the document you want to open. Click the list arrow that appears and select **Check Out** from the list. Click **OK** and click the document to open it.
- **To Check In a Document:** Make sure the document is not open in another program. Click **Libraries** on the Quick Launch bar and click the library containing the document you want to check in. Point to the document, click the list arrow that appears, and select **Check In** from the list. Complete the options that appear and click **OK**. Click **Yes** to confirm the check in.
- **To Create a New Document:** Navigate to the library or folder in which you want to create a document. Click the **Documents** tab on the Ribbon and click the **New Document** button in the New group. Click **OK**. Click **Save** when you have finished making changes to the document. Enter a name for the file in the File name box and click **Save**. Click the **Close** button to close the Word document.
- **To Create a New Folder:** Navigate to the library or folder in which you want to create a new folder. Click the **Documents** tab on the Ribbon and click the **New Folder** button in the New group. Enter a folder name and click **Save**.
- **To Upload a Single Document:** Navigate to the library or folder in which you want to create a new folder. Click the **Documents** tab on the Ribbon and click the **Upload Document** button in the New group. Click the **Browse** button, select the document you want to upload, and click **Open**. Enter any version comments and click **OK**. Check in the document, if necessary.
- **To Upload Multiple Documents:** Navigate to the library or folder in which you want to create a new folder. Click the **Documents** tab on the Ribbon and click the **Upload Document** button list arrow in the New group. Select **Upload Multiple Documents** from the list. Open Windows Explorer and navigate to the documents you want to upload. Drag and drop files in the Upload Multiple Documents dialog box. When you are finished, click **OK**.

Surveys and Discussions

- **To Respond to a Survey:** Click **Surveys** on the Quick Launch bar and open the survey to which you want to respond. Click **Respond to this Survey** on the toolbar and answer the survey questions. Click **Finish** when you are done.
- **To View Survey Responses:** Click **Surveys** on the Quick Launch bar and open the survey for which you want to see responses. Click the **Show a graphical summary of responses** or **Show all responses** link
- **To Create a New Discussion Topic:** Click **Discussions** on the Quick Launch bar and open the discussion to which you want to contribute. Click the **New** button on the toolbar, enter the subject name and fill in the Body section. Click **OK**.
- **To Reply to a New Discussion Topic:** Click **Discussions** on the Quick Launch bar and open the discussion to which you want to contribute. Click the discussion thread to open it. Click the **Reply** button next to the post to which you want to reply. Enter your response to the topic in the fill in the Body section and click **Save**.

Wikis

- **To View a Wiki:** Click the wiki name under Libraries in the Quick Launch bar.
- **To Add a Wiki Page:** Open the wiki site and click the **Page** tab on the Ribbon. Click the **Edit** button in the edit group and enter the name of the new page enclosed in double brackets. For example, type `[[Help]]` to create a link to a page called help. Click the **Save & Close** button in the Edit group on the Ribbon and click the link to the page you just created. Click the **Create** button to create the page.
- **To Link to Another Wiki Page:** Type the page name enclosed in double brackets in the wiki content area.
- **To Edit a Wiki Entry:** Open the wiki page and click the **Page** tab on the Ribbon. Click the **Edit** button in the Edit group and make changes as necessary. Click **Save & Close** on the Ribbon when you are finished.

Blog

- **To View a Blog:** Click the blog name in the top link bar or Quick Launch bar.
- **To Create a Blog Post:** Open the blog site and click the **Create a post** link under Blog Tools list on the right side of the page. Enter a name for the post in the Title box and enter the blog content in the Body area. Click **Save as Draft** to save the draft so only you can see the post. Click **Publish** to let everyone with access to the blog see the post.
- **To Comment on a Blog Post:** Open the blog site and click the **Comments** link below the post to which you want to respond. Enter the comment title and body, and click **Submit Comment**.
- **To Receive Blog Updates through an RSS Feed:** Open the blog site. Click the **RSS Feed** link at the bottom of the Home page. Click **Subscribe to this feed** and click **Subscribe** in the dialog box.

Lists

- **To Add an Event:** Click **Lists** on the Quick Launch bar and click the calendar to which you want to add the event. Click the **Events** tab on the Ribbon and click the **New Event** button in the New group. Enter information about the event and click **Save** when you are done.
- **To Synchronize the SharePoint Calendar with your Outlook Calendar:** Click **Lists** on the Quick Launch bar and click the calendar or task list you want to synchronize. Click the **Calendar** tab on the Ribbon and click the **Connect to Outlook** button in the Connect & Export group. Follow the prompts to allow SharePoint access to Outlook.
- **To Add a Task:** Click **Lists** on the Quick Launch bar and click the task list to which you want to add a task. Click the **Items** tab on the Ribbon and click the **New Item** button in the New group. Enter task information and click **Save**.
- **To Update a Task:** Open the task list containing the task you want to update. Click the task hyperlink. In the task dialog box, click the **Edit Item** button on the View tab of the Ribbon. Update values in the Status and % Complete fields. Update other fields as needed and click **Save**.
- **To Edit an Item:** Click **Lists** on the Quick Launch bar and open the list that contains the item you want to edit. Point to the list item and click the list arrow. Select **Edit Item** from the list, edit the item and click **Save**.
- **To Delete an Item:** Click **Lists** on the Quick Launch bar and open the list that contains the item you want to delete. Point to the list item and click the list arrow. Select **Delete Item** from the list and click **OK**.
- **To Restore an Item:** Click **Recycle Bin** on the Quick Launch bar and click the check box next to each item you want to restore. Click **Restore Selection** on the toolbar and click **OK**.
- **To Receive an Alert when an Item Changes:** Select the item for which you want to receive an alert and click the Items tab on the Ribbon. Click the **Alert Me** button in the Share & Track group on the Ribbon and select **Set alert on this item** from the list. Enter the alert information and click **OK**.