# **SharePoint Foundation 2010**

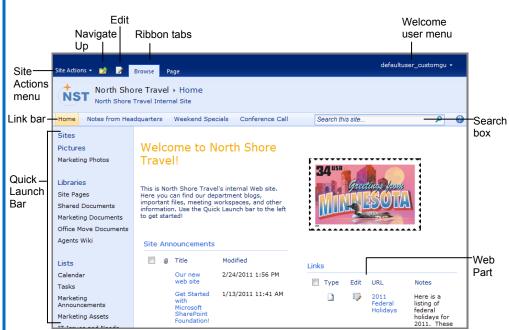
# **Quick Reference Card**



### **Customizable Training Materials**

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# **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.

## 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 W 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.

## **Quick Launch**

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.

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

#### Discussions

Participate in group discussions using discussion boards.



Deleted information is stored here.



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.



### **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
- 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 and 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.

