

SharePoint 2007 Quick Reference Guide

Quick Launch

Documents

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

Lists

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

Discussions

Participate in group discussions using a discussion boards.

Sites

Collaboration areas can include team sites, workspaces, blog sites, and wiki sites. Important sub sites may also appear in the Quick Launch.

Pictures

Picture libraries are the best way to store shared images.

People and Groups

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

Recycle Bin

Deleted information is stored here.

Permission Levels

Understanding Permissions:

Each user who 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.

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

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

Approver: Can view, add, update delete, and approve.

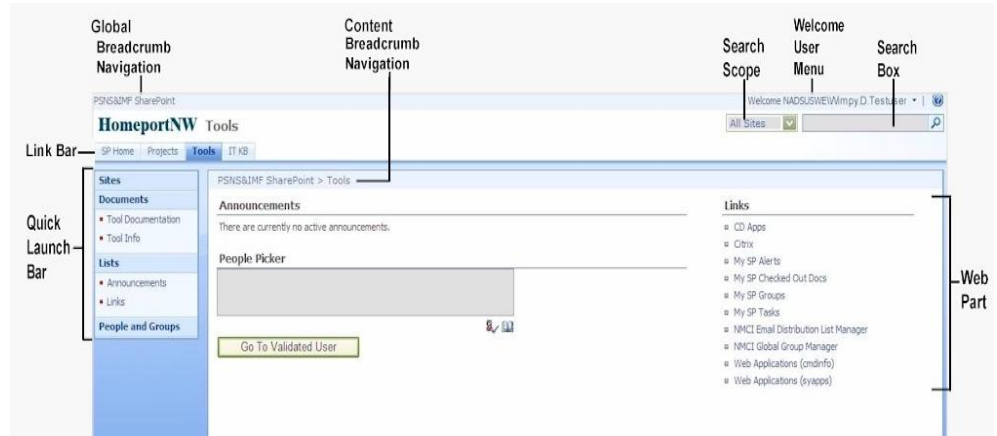
Managed List: Create, delete lists, add, remove columns, add, remove public views, override checkout.

Create Sites Design Create Sub Site, Manage Web Site, Permissions.

Admin POC:

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

Version 3.0



The Fundamentals

There are three main tools for navigation in a SharePoint site:

Link Bar: This includes the tabs that appear along the top of the site. Sub sites of the current site usually appear as tabs 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 users have been, and where the current page fits in the hierarchy of sites and items in the site.

To Navigate in a SharePoint Site:

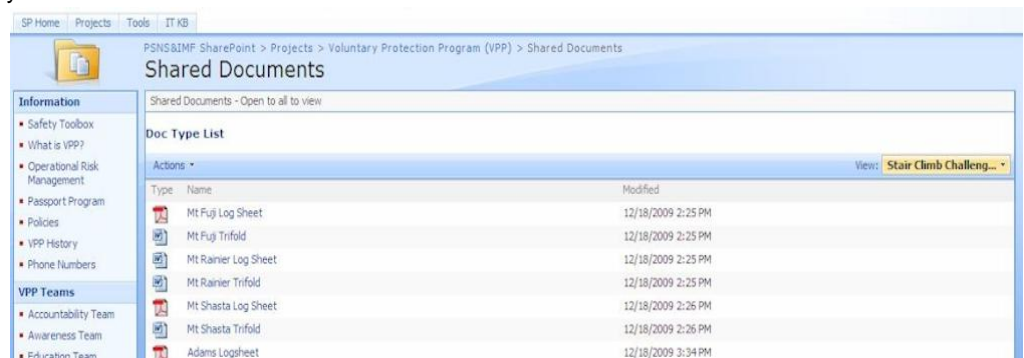
SharePoint sites work just like any other site on the Internet. Click a hyperlink to view the page or item to which it is connected.

To View all Content in the Current Site: Click the **View All Site Content** link when available, at the top of the Quick Launch Bar. All the lists, libraries, discussion boards, and sub sites and workspaces appear on one page.

To Search: Click in the Search box at the top of the page. Type your search word or term and press **<Enter>**

To change the Search Scope: Click the **Search Scope** list arrow and select the scope within which you want to search. Use Search Scope to limit a search to the current list, site or all sites.

To Change Views: You can change how items are displayed in a library or list by changing views. Click the **View** list arrow on the right side of the toolbar and select the view you want to use.



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.

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.

Calendar

To Add an Event: Click **Lists** on the Quick Launch bar, click the calendar you want to add an event to, and click **New** on the toolbar. Or, click the **Add new event** link underneath the Calendar web part on the home page. Enter the event information and click **OK**.

To Synchronize the SharePoint Calendar with your Outlook

Calendar: Click **Lists** on Quick Launch bar, click the calendar or task list you want to synchronize. Click **Actions** on the toolbar and select **Connect to Outlook**. Click **Yes**. Click **Close** to return to SharePoint.

Task

To Add a Task: Click **Lists** on the Quick Launch bar, click the task list you want to add a task to, and click **New** on the toolbar. Enter the task information and click **OK**.

To Update a Task: Open the task list containing the task you want to update. Click the task and click **Edit Item** on the toolbar. Update values in the status and % Complete fields. Update other fields as needed, click **OK**.

Create List Manage List

To Edit an Item: Click **List** 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 **OK**.

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.

To Receive an Alert when an item Changes: Click the **Actions** button on the toolbar and select **Alert Me** from the list. Enter the alert information and click **OK**.

Documents

Document Library A document library lets users share, collaborate, collect, and manage files with others.

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 **Documents** 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 **Edit** list arrow 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 **Documents** on the Quick Launch bar and click the library containing the document you want to check in. Point to the document, click the **Edit** list arrow, 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 in which you want to create a document. Click the **New** button on the toolbar and 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 Upload a Single Document: Click **Documents** on the Quick Launch bar and click the library into which you want to upload a document. Click the **Upload** button list arrow on the toolbar and select **Upload Document**. Click the Browse button, select the document you

want to upload, and click **Open**. Click **OK**, change document properties, and click **OK** again. Then check in the document, if necessary.

To Upload Multiple Documents: Click **Documents** on the Quick Launch bar and click the library into which you want to upload a document. Click the **Upload** button list arrow on the toolbar and select **Upload Multiple Documents**. Select the location containing the documents you want to upload, and click the check box next to each document you want to upload. Click **OK**.

Discussions

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 **OK**.

Wikis

To View a Wiki: Click the wiki name in the Link Bar or Quick Launch bar.

To Add a Wiki Page: Open the wiki site and click **Wiki Pages** in the Quick Launch bar. Click the **New** button on the toolbar. Type a name for the wiki page in the name box; enter the wiki page content in the Wiki Content area. Click **Create** button to save changes and create the page.

To Link to Another Wiki Page: Type the page name enclosed in the double brackets in the content area. For example, type [[Page Name]].

To Edit a Wiki Entry: Open the wiki page and click **Edit**. Make the changes as necessary and click **OK**.

To Create a New Wiki Page from a Link: Click the **Add to Favorites** button and select **Organize Favorites**.

Blog

To View a Blog: Click the blog name in the Link Bar or Quick Launch bar.

To Create a Blog Post: Open the blog site and click **Create a post** in the Admin Links 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. 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 on the Quick Launch bar. Click Subscribe to this feed and click Subscribe in the dialog box.

Help

To Get Help: Click the Help Button in the top right corner of the SharePoint site page.

IT KB: IT Knowledge Base contains tips, tricks, and solutions too many IT related issues. Use the SharePoint items view to find SharePoint specific content.