



SHAREPOINT ONLINE AND 2013 QUICK REFERENCE GUIDE







TABLE OF CONTENTS:

BEGINNER

1.	CREATE AND SET UP A LIST
2.	START USING A LIST
3.	INTRODUCTION TO LIBRARIES
4.	SHARE DOCUMENTS AND MANAGE VERSIONS
5.	FOLLOW A DOCUMENT OR WEBSITE IN YOUR ORGANIZATION 14
6.	UPDATE YOUR PROFILE
7.	POST TO THE NEWSFEED
8.	SYNC SHAREPOINT LIBRARIES TO YOUR COMPUTER USING SKYDRIVE PRO
9.	CREATE AND MANAGE A SHAREPOINT BLOG
10.	CUSTOMIZE YOUR PUBLIC WEBSITE
IN	TERMEDIATE
1.	CREATE AND CUSTOMIZE PAGES ON YOUR PUBLIC WEBSITE 29
2.	ORGANIZE AND CONFIGURE A SHAREPOINT LIBRARY



Quick Reference Card

CREATE AND SET UP A LIST

A SharePoint list is a handy tool for sharing contacts, calendar appointments, tasks, or data with team members and site visitors, and provides the underlying structure for organizing information on your site. This course shows you how to create a list and set it up for your team to use.

CREATE A LIST

1. Click Settings \rightarrow Add an app.



- 2. Search for the list app you want to use and then click the name of the app to create the list. For example, search for "contacts" and then click the Contacts app.
- 3. Type a name for the list in the **Name** box and then click **Create**.

ADD AN EXISTING COLUMN TO A VIEW OF THE LIST

1. At the top of the list, click the ellipses (...), and then click **Modify this View**.



Select the check box for the column you want to add and then click **OK**.

CREATE A NEW COLUMN

1. At the top of the list, click edit.



Tech Tips by MESSAGE

- Click the plus sign (+), and then select the column type from the list that appears.
- Reset the sorting, filter, and other options, and then click **Save**.

SHARE A LIST

You can share a list only if you created the list or the site. If you didn't create the list or site, you can email a link to the list instead.

1. Click List → Shared With.



In the Shared With dialog box, click INVITE PEOPLE.



Tel.: 877-788-1617





Type the names of the people you want to share the list with and then click **Share**.

EMAIL A LINK TO A LIST

1. Click List \rightarrow E-mail a Link.



- Click **Allow** in the warning that pops up to allow your email program to open a new email message.
- A new email message opens with a link to the list included. Add people to the **To** line, finish the message, and send it.

SET UP AN ALERT

- 1. Click List \rightarrow Alert Me \rightarrow Set an alert on this list.
- 2. On the **New Alert** page, change the title for the alert if you want.
- 3. In the **Send Alerts To** section, enter the user names or email addresses of people you want alerts to be sent to.
- 4. Set other options in the **Change Type**, **When to Send Alerts** and other sections, and then click **OK**.



Microsoft[®] SharePoint



START USING A LIST

A list is a place on a SharePoint site where you can share information with other people in your company. This is where you can store and share contacts, calendar appointments, tasks, or other sorts of information you need to track.

Card

WHERE CAN I FIND A LIST?

- 1. On your team site, look for the name of the list in the navigation, or click Settings $\stackrel{\text{def}}{\longrightarrow}$ \rightarrow Site contents.
- 2. Click the name of the list to open it.



ADD AN ITEM TO A LIST

1. In the list where you want to add an item, click new item.



Enter the information for the list item.

Click Save.

ADD OR EDIT MULTIPLE ITEMS IN A LIST

1. At the top of the list you want to edit, click edit.



Type information in the boxes.

When you're finished editing, click Stop editing.

DELETE ITEMS IN A LIST

There are multiple ways to delete items in a list. Here's the quickest way:

- Select the items you want to delete. 1.
- Click Items → Delete Item. 2.





Quick Reference Card



EDIT ALL THE DETAILS IN A LIST ITEM

1. Select the item you want to edit, click the ellipses (...), and then click **Edit Item**.



Edit the information in the form that appears.

When you're finished editing, click Save.

SORT OR FILTER A LIST BY COLUMN HEADING AND SAVE THE VIEW

- 1. In the list, point to the heading you want to sort or filter the list by, and then click the arrow that appears
- 2. To sort by the heading, click **A on Top** or **Z on Top**.

3. To filter, select the one or more check boxes.



To save the view you created, click **SAVE THIS VIEW** at the top of the list near the **Search** box.

CREATE A PERSONAL VIEW OF A LIST

1. At the top of the list, click the ellipses (...) between the view names and the **Search** box, and then click **Create View**.



Choose a view type or start from an existing view.

On the **Create View** page, type a name for the view.

- Select the columns you want to appear, and use the position numbers to set the order of the columns.
- Set the sorting, filter, and other options, and then click **Save**.









SEE ALSO:

- Introduction to lists
 <u>http://office.microsoft.com/en-us/sharepoint-help/introduction-to-lists-HA102771955.aspx</u>
- Add, edit, or delete list items
 <u>http://office.microsoft.com/en-us/sharepoint-help/add-edit-or-delete-list-items-HA102771938.aspx</u>
- Create, change, or delete a view of a list or library
 <u>http://office.microsoft.com/en-us/sharepoint-help/create-change-or-delete-a-view-of-a-list-or-library-HA102774516.aspx</u>
- Create, change, or delete a column in a list or library
 <u>http://office.microsoft.com/en-us/sharepoint-help/create-change-or-delete-a-column-in-a-list-or-library-HA102771913.aspx</u>





Tech Tips by MESSAGE @PS

INTRODUCTION TO LIBRARIES

A document library is a place on a SharePoint site where you can share files, such as Word documents and Excel spreadsheets, with other people.

HOW DO I FIND A DOCUMENT LIBRARY?

1. If your department has a team site, look for Shared documents or a similar name, typically on the left side.

Click the name of the library to open it.



HOW DO I CREATE A LIBRARY?

1. On the Settings menu, click Add an app.



Click the library you want to add, in this case Document Library.



Name the library, and then click Create.

ADD FILES TO A LIBRARY

1. There are different ways to add files to a library, but the quickest way is to click the new document link.

Shared documents Image: Instruction of drag files here Image: Instruction o





Quick Reference Card



You can also add more than one document at a time, and even drag files from Windows Explorer.

Documents Find file				
Wat				
			ing here	
	C C C C C C C C C C C C C C C C C C C	Sample do	ts - 49 Search Sample do	103
Copy Beying Sal ^{Me} + Copy	Organize 💌 👿 Open	Print	Burn New folder	H • D 0
Contoso_Legal_Contract #	- Enumeritar	*	Name	Date modified
	Ring Search	=	Reijing BridgeRepair	7/9/2012 11-25 AM
	Desktop		Beijing Salmon	7/9/2012 10:25 AM
	Downloads		Contoso Legal Contract	7/12/2012 9:36 AM
	E ITWeb		Madrid_Urban_Park	7/11/2012 2:13 PM
	MSW Intranet		Partnership Agreement - Fabrikam	7/12/2012 9:39 AM
	Secent Places		Sales report, January 2012	7/12/2012 9:26 AM
	🔀 SharePoint Sites		Sao_Paolo_Bridge_Construction	7/11/2012 2:14 PM
	and Shuffering			
	Sin Drive			

RENAME FILES IN A LIBRARY

1. Click on the ellipses next to a file you want to rename, and then click the ellipses on the callout.

Click Edit Properties.

Rename the file in the **Name** field and click **Save**.

BROWSE	DIT		
Save Cancel	Paste & Cut	Delete Item	
Commit	Clipboard	Actions	
Home			
Home		Name *	Beijing_BridgeRepair .docs
Documents		W11	
Recent		Tible	
Vacation	Calendar	Created at 9/1	18/2812 8:37 AM by System Account Save Cancel
Site Contents		Last modified	at 9/10/2012 8:37 AM by System Account
🖋 EDIT LINK	5		

DELETE FILES IN A LIBRARY

- 1. Click on the ellipses next to a file you want to delete, and then click the ellipses on the callout.
- 2. Click Delete.

3. Click **OK** to confirm sending the file to the Recycle Bin.

	ocum	ents ···· Find a file		Beijir	ng_Brido	geRepair.	docx ×
~		Name		Change	d by you a	in 9/10/2012	8:37 AM
~	4 1	Beijing_BridgeRepair 🗱	{	Shared	with 🗆 Cris	Berns and	
	8	Beijing_Salmon X		http://	snhvm-132	0/Shared%20	1Documents/F
		Contoso_Legal_Contract 🛠	:	map.//	shuun 797	oy shared rock	20 dealmentayle
				OPEN	SHARE	FOLLOW	
							View Propertie
							Edit Properties
							Check Out
							Compliance De
							Workflows
							Download a Co
							Shared With
						- F	Delete

VERSIONING, ALERTS, OR CO-AUTHORING

Libraries have other features to help you be more productive, such as:

- Versioning enables you to track versions of files, so you can see a history of changes, and restore a version if you make a mistake.
- Alerts let you know by mail or text if a file has been changed. You can set an alert for one file or a whole library, and control how often you get alerted.
- Co-authoring enables you and other co-workers to edit files at the same time in certain Office programs, such as Word, PowerPoint, and Excel.







SEE ALSO:

- Introduction to libraries
 <u>http://office.microsoft.com/en-us/sharepoint-server-help/introduction-to-libraries-HA102771924.aspx?CTT=1</u>
- Add or delete files in a library
 <u>http://office.microsoft.com/en-us/sharepoint-server-help/add-or-delete-files-in-a-library-HA102803549.aspx?CTT=3</u>
- Enable and configure versioning for a list or library
 <u>http://office.microsoft.com/en-us/sharepoint-server-help/enable-and-configure-versioning-for-a-list-or-library-HA102772148.aspx?CTT=3</u>
- Create an alert <u>http://office.microsoft.com/en-us/sharepoint-server-help/create-an-alert-or-subscribe-to-an-rss-</u> feed-HA102771918.aspx?CTT=1







SHARE DOCUMENTS AND MANAGE VERSIONS

Share a document with your co-workers to allow them to review or edit your document, and learn how to track document versions or return to a previous one.

Note that the capabilities described here depend on whether your organization has set up and customized personal sites and profiles.

SHARE A DOCUMENT

If you're using Office 365, you may be able to invite external users (people not on your network) to share a document, by inviting them as "Guests." For details, see <u>Share sites or documents with people outside your</u> <u>organization</u>.

To share a document with others in your organization:

- 1. Click **SkyDrive** in the header at the top of a SharePoint or Office 365 site in your organization.
- 2. Click the ellipses (...) next to the document to open the document's callout and then click **Share**.



In the **Share** window, enter the name of each person you want to invite to share the document.

Can edit
al message with this invitation (Optional).
<u>1</u>
<u>1</u>

- From the drop-down menu, click the permission, **View** or **Edit**, that you want to grant invitees.
- Type a message to be sent to all invitees in an email, or click **Show Options** and then uncheck **Send an email invitation**.

If you don't send an email to invitees, they won't get notified that you've shared the document. However, they can see the document if they visit your **SkyDrive** library, or if they search for the document.

MANAGE DOCUMENT VERSIONS

To see your own most recent version of a **SkyDrive Pro** document:

- 1. Click **SkyDrive** in the header at the top of any SharePoint site in your organization.
- 2. Click the ellipsis (...) next to the document to display its details page. You can see who edited the document and the date of those changes.

	0	Portland: Similar campaig	nes Seattle, craft it onique to the	city	
WB	PAGE 1 OF	2			_
Chang UNDO Shareo	ed by 🗆 A CHANGES d with 🗆 Zr	lex Darrow o inka Makova	n 1/24/2013 5:42 c and 🗆 Alex Dar	2 PM row	
https	://contoso	corporation9	96-my.sharepoin	t.com/perso	nal/mollvd
		•	2		
EDIT	SHARE	FOLLOW			

To return to your own most recent version of the document, select **UNDO CHANGES**.







VIEW OR EDIT A DOCUMENT THAT'S SHARED WITH YOU

- 1. Click the document link in the email you received informing you that a co-worker has shared a document with you.
- 2. If you don't have edit permission, review the readonly document and save any notes or other work in a separate file.
- 3. If you have edit permission, check out the document, edit it, and click **File** \rightarrow **Save** to save your changes.

ADD MORE PEOPLE TO THE SHARING LIST

Card

Click the Shared with some people icon in the Sharing column and invite additional people to view or edit the document.

SkyDrive @ Contoso Corporation Search everything									
We	elcom re. D	e to SkyDrive @ Contoso Corporation, the place to ismiss	o stor	e, sync, and share your	work. E	Documents are private until share			
(+)	new	document							
All		Find a file							
~	۵	Name		Modified ->	Sharing	Modified By			
		Personal		November 02, 2012	a	Alex Darrow			
		Shared with Everyone		November 02, 2012	25	Alex Darrow			
		Shared With Everyone 2		January 09	8	Alex Darrow			
~		Asia Q3 Marketing Overview Beta		November 02, 2012	7 Share	Alex Darrow			
		Marketing Slogan Suggestions		5 days ago	6	 Alex Darrow 			
	٩	Marketing Term Successes		November 02, 2012	۵	Alex Darrow			









SEE ALSO:

- Share items in SkyDrive Pro
 http://office.microsoft.com/en-us/sharepoint-server-help/share-items-in-skydrive-pro-HA102788380.aspx
- Manage document versions
 <u>http://office.microsoft.com/en-us/office365-sharepoint-online-enterprise-help/manage-document-versions-in-your-skydrive-pro-library-HA103158256.aspx?CTT=1
 </u>
- Collaborate on documents
 <u>http://office.microsoft.com/en-us/sharepoint-server-help/collaborate-on-documents-HA102785873.aspx?CTT=1</u>
- Share sites or documents with people outside your organization
 <u>http://office.microsoft.com/en-us/office365-sharepoint-online-enterprise-help/share-sites-or-documents-with-people-outside-your-organization-HA102894713.aspx</u>
- Video: Share documents <u>http://office.microsoft.com/en-us/redir/VA102897384.aspx</u>
- Video: Manage SkyDrive Pro document versions <u>http://office.microsoft.com/en-us/redir/VA102897389.aspx</u>







FOLLOW A DOCUMENT OR WEBSITE IN YOUR ORGANIZATION

Follow a document to see notifications in your newsfeed when someone updates the document or shares it with others, and to keep the document handy in a followed documents list. Follow a site to keep it accessible in a list of followed sites and to see site feed activity in your own newsfeed.

Note that the capabilities described here depend on whether your organization has set up and customized personal sites and profiles.

FOLLOW A DOCUMENT

Before you can follow a document, you need permission to access it. You're granted this permission when another person shares the document with you. Typically, you can follow documents in a **Shared with Everyone** folder.

To follow a document:

1. Browse to a document library on a SharePoint or Office 365 team site.

To browse to your personal library, click **SkyDrive Pro** in the header.



Click the library or folder that contains the document or other file you want to follow.

Click the ellipses (...) next to the document.

Click Follow.



FIND A DOCUMENT THAT YOU FOLLOW

- 1. Click **SkyDrive** in the header from a SharePoint or Office 365 site.
- 2. Click **Followed Documents** in the **Quick launch** on the left.

Coffice 365		Outlook Calendar People Newsfeed	SkyDrive Sites Alex Darrow 🖷 🕸
Der	SkyDrive @ Contoso Corporation Docs I'm following		↑ Search everything ▼ €
N DA	AT1000 Product Overview https://contoscorporation/996.sharepoint.com/ Stop following	https://contoscorporation996.sharepoint.com/ Stap following	Suggested documents to follow Asia Q3 Marketing Overview Mitter// Documents/Asia Q3 Marketing Devoice Ref
Alex Darrow	International Marketing Campaigns https://contosocorporation/996.sharepoint.com/ Stop following	New Supplier https://contosecorporation996.sharepoint.com/s Stop following	☆ Follow
My Documents Followed Documents	Q2 Marketing Analysis https://contosocorporation/96.sharepoint.com/ Stop following		NET PHU GUERS FUT QT SETIES https:///Ad Goals for QT Series.pptx 合 Follow

Or, click **Newsfeed** in the header and then click the number for documents under **I'm following**.

Your followed documents appear under **Docs I'm** following.

FOLLOW A WEB SITE

- 1. Go to a SharePoint site that you want to follow.
- 2. Click **Follow** in the top right of the page.
- 3. If the site has a newsfeed, to stay up to date with site news, look for updates from the site feed in your own newsfeed.







Quick Reference

Card



FIND A WEB SITE THAT YOU FOLLOW

Click Sites in the header.



Or, click **Newsfeed** in the header and then click the number for sites under **I'm following**.

Office 365	Outlook Calendar People Newsfeed SkyDrive Sites ···· Alex Darrow	Ŧ
0	Share with everyone -	
E HIT	Start a conversation Search conversations * , P	
T B MODET	Following Everyone Mentions I'm following	
	Molly Dempsey > Marketing Documents 4	
Alex Darrow	Makovac and @Garth Fort you can find a copy on our Marketing Documents people	
Newsfeed	end of the week so we can incorporate your comments. Thanks! 5	
About me	documents	
Blog	Dempsey. Ventrofer al 618.0M Like Follow Gath Fort	
Apps	Zrinka Makowa: Tve got a meeting in five minutes, but Til have a look	
Tasks	back at the hotel tonight. Vesterday at 747 PM via SharePoint Newsfeed for Windows	
EDIT LINKS	Phone Like tags	
	Add a reply	

Your followed sites appear under Sites I'm following.

SEE ALSO:

- Follow documents to track them <u>http://office.microsoft.com/en-us/office365-sharepoint-online-small-business-help/follow-documents-to-track-them-</u> <u>HA102785928.aspx</u>
- Follow sites that interest you
 <u>http://office.microsoft.com/en-us/office365-sharepoint-online-enterprise-help/follow-sites-that-interest-you-HA102785930.aspx?CTT=1</u>
- Video: Follow documents <u>http://office.microsoft.com/en-us/redir/VA102897380.aspx</u>
- Video: Follow a SharePoint site <u>http://office.microsoft.com/en-us/redir/VA102897383.aspx</u>



Quick Reference Card

UPDATE YOUR PROFILE

Update your profile to introduce yourself to co-workers and update privacy settings so you can share or hide personal information according to your needs. Note that your profile pages and the items you can edit may differ from the descriptions below, depending on how your administrators have customized profile pages for your organization.

WHERE IS MY PROFILE?

You'll find a link to your profile in the top right corner of any of your organization's SharePoint 2013 or Office 365 web pages.

VIEW OR EDIT YOUR PROFILE

1. Click <your name> \rightarrow About Me.



Click edit your profile to display the Edit Details.



Review or edit your **Basic Information** page or go to another page by clicking **Contact Information** or **Details**.



To review or edit your **Newsfeed settings** page, click the ellipses (...) and then click **Newsfeed Settings**.

Tech Tips by MESSAGE



UPDATE YOUR PROFILE PICTURE AND DESCRIPTION

- 1. Open your profile for editing.
- 2. Under Basic information, click Upload picture.
- 3. Browse to locate the picture you want.
- 4. Click **Upload**.











To add or update your About me text, click in the About me box and type a personal description. Use the formatting tools in the ribbon to add special text effects such as color, bold type, and bullets.



Click Save all and close.

LIST YOUR AREAS OF EXPERTISE

- Open your profile for editing. 1.
- 2. Under Basic Information, click in the Ask Me About box.



Type key words in the box. Separate multiple keywords with semicolons. If you see an appropriate suggestion, click the keyword.

Click Save all and close.

UDATE YOUR CONTACT INFORMATION

- 1. Open your profile for editing.
- Click Contact Information. 2.

Card

Coffice 365		Outlook	Calendar	People	Newsfeed	SkyDrive	Sites	Rob Young +	ø	?
BROWSE										H
	Edit Detai	ls					Search everything		* ¢	Þ
1	Basic Informatic	Contact Information	etails			Who ca	in see this?			
Rob Young	Work email	RobY@ContosoCorporation996.onmic	rosoft.com			Everyor	ne			
	Mobile phone					Everyor	ne .			
Newsfeed		This number will be shown on your profile	Also, it will be	used for t	iext					
About me		message (swis) alerts.								
Blog	Fax					Everyo	ne 💌			
Apps	Home phone					Evenin				
Tasks						crujo				
lecent	Office	19/2109				Everyor	ne -			
My calendar	Office Location				2	Evenvo	ne 🔳			
✓ EDIT LINKS		Enter your current location. (e.g. China, Tokyo, West Campus)								
	Assistant				\$√ 🖽	Everyor	10			
					Save all and ci	ose C	ancel and go back			

Edit your phone number and other contact information as needed.

Click Save all and close.

UPDATE YOUR PERSONAL DETAILS

- 1. Open your profile for editing.
- 2. Click Details.



- To list past projects or other information that you might want to share or make note of, add some key words to the Past projects or other list boxes.
- If you want display or note your birthday, type the date in the **Birthday** box.

Click Save all and close.



Quick Reference Card



UPDATE YOUR PROFILE PRIVACY SETTINGS

- 1. Open your profile for editing.
- 2. Click Contact Information or Details.
- 3. Under **Who can see this?** click the down arrow to the right of an item you want to change.
- 4. Click Everyone or Only Me.

Cffice 365		Outlook Cale	ndar People	Newsfeed	SkyDrive	Sites	Rob Young +	4
BROWSE								
	Edit Deta	ails			Sean	ch everything		
5	Basic Informa	tion Contact Information Detai	ls		Who car	n see this?		
Rob Young	Work email	RobY@ContosoCorporation996.onmicrosoft.	com		Everyon	e		
	Mobile phone				Everyon	e		
Newsfeed		This number will be shown on your profile. Also, it message (SMS) alerts.	t will be used for	text				
About me Blog	Fax				Evenuor			
Apps					ercijo			
Tasks	Home phone				Only M	e 🔳		
Recent	Office	19/2109			Everyon	e		
My calendar	Office Location			8	Everyor	e •		
✓ EDIT LINKS		Enter your current location. (e.g. China, Tokyo, West Campus)			-			
	Assistant			8. EP	Everyon	e		
				*V 113				
				Save all and	ciose Ca	ncel and on back		

UPDATE YOUR NEWSFEED SETTINGS

- 1. Open your profile for editing.
- 2. Click the ellipses (...) and then click **Newsfeed Settings**.



- Under **Who can see this?** click the down arrow to the right of an item you want to change.
- To see posts in your newsfeed about specific topics, type key words in the **Followed #Tags** box.

- To specify which activities you want to be notified about in email, in the **Email Notifications** section, select the items that interest you.
- To specify what information you want to share with people in your organization, update the **Who can see this?** setting for your **Followed Tags**, and select or clear the **People I follow** option and **Activities I want to share items** as needed.

UPDATE YOUR NEWSFEED PRIVACY SETTINGS

- 1. Open your profile for editing.
- 2. Click the ellipses (...) and then click **Newsfeed Settings**.
- 3. To change who can see your list of **Followed #Tags**, under **Who can see this?** click **Everyone or Only Me**.
- 4. To change who can see the lists of people that you follow and people who follow you, select or clear the **People I follow** option.
- To specify activities you want to share with people in their newsfeeds, select the Activities I want to share items that you want profile visitors to be able to see.

BROWSE					
	Edit Detail	S		Search everything	ز +
51	Basic Information	Contact Information Newsfeed Settin	igs	Who can see this?	
Rob Young	Followed #Tags		6	Everyone •	
		Stay up-to-date on topics that interest you by following #tags. Post #tags will show up in your newsfeed.	ts with these		
Newsfeed	Email Notifications	THE Compose has started following ma			
About me	Linal Houndations	Sumetions for people and keswords I might be interested in			
Blog		Someone has mentioned me			
Apps		Someone replied to a conversation that I started			
Tasks		Someone replied to a conversation that I replied to			
Decent.		Someone replied to my community discussion post			
Recent		Pick what email notifications you want to get.			
My calendar					
d rom in wr	People I follow	Allow others to see the people you're following and the people	following	Everyone	
 EDIT LINKS 		you when they view your profile.			
	Activities I want to	Share all of them		Everyone	
	share in my	Following a person			
	newsfeed	Following a document or site			
		Following a tag			
		Tagging an item			
		 Birmday celebration Inh title change 			
		Workolace anniversary			
		Updating your "Ask Me About"			
		Posting on a note board			
		Liking or rating something			
		New blog post			
		Participation in communities			
		Pick the activities you want to tell people about.			
			Save all and close	se Cancel and go back	









SEE ALSO:

- View and set up your profile. http://office.microsoft.com/en-us/sharepoint-server-help/view-and-set-up-your-profile-HA102785967.aspx
- Update your profile privacy settings
 <u>http://office.microsoft.com/en-us/office365-sharepoint-online-enterprise-help/update-your-profile-privacy-settings-HA103338255.aspx</u>
- Update your newsfeed privacy settings
 <u>http://office.microsoft.com/en-us/office365-sharepoint-online-enterprise-help/update-your-newsfeed-privacy-settings-HA102781017.aspx</u>
- Video: Update your profile <u>http://office.microsoft.com/en-us/redir/VA102897378.aspx</u>
- Video: Update your profile privacy settings <u>http://office.microsoft.com/en-us/redir/VA102897377.aspx</u>
- Video: Update your newsfeed privacy settings <u>http://office.microsoft.com/en-us/redir/VA104011765.aspx</u>







POST TO THE NEWSFEED

Start conversations with people in your organization by posting to a newsfeed, either on your personal site, or in team site newsfeeds.

CREATE A SIMPLE POST

- 1. Click in the Start a conversation box.
- 2. Type your message.



Click Post.

ADD A PICTURE TO A POST

- 1. Click in the Start a conversation box.
- 2. Type a message (optional)
- 3. Click the camera button.

Share with everyone -

Check out this amazing view:



Browse to the picture you want and click **Open**.

Click Upload.

ADD A LINK TO A DOCUMENT TO A POST

- 1. Go to the SharePoint library that has the document.
- 2. Click the ellipses menu to open the document callout.

3. Copy the document URL.



Click **Newsfeed** at the top of the page (or go to the team site newsfeed you want).

Click in the Start a conversation box.

Right-click and paste in the document URL.

Click in the **Display As box**, type the words you want to appear as the document link, and click the check mark.

Click Post.

ADD A WEBLINK TO A POST

- 1. Go to the web page you want to link to.
- 2. Copy the web page URL.
- 3. Click **Newsfeed** at the top of the page (or go to the team site newsfeed you want).
- 4. Click in the Start a conversation box.
- 5. Right-click and paste in the web page URL.



Microsoft[®] SharePoint



Click in the Display As box, type the words you want to appear as the weblink text, and click the check mark.

Here's a link to the <http: <="" pages="" th="" www.mssharepointconference.com=""><th>agenda</th><th>a.aspx></th></http:>	agenda	a.aspx>
URL: http://www.mssharepointconference.com/Pages/agenda.aspx		
Display as:		
SharePoint Conference Agenda	\checkmark	×

Click Post.

ADD A VIDEO TO A POST

Use the same procedure as described above for "Add a weblink to a post."

MENTION SOMEONE IN A POST

- 1. Click in the Start a conversation box.
- 2. Type a @ character.
- 3. Start typing the name of the person you want to mention.
- 4. Select the name if you see it in the list.



Finish the post and then click Post.

ADD A HASHTAG TO A POST

- 1. Click in the Start a conversation box.
- 2. Type a **#** character.

Card

- 3. Start typing the tag you want to add.
- 4. If available, select an existing tag from the list.

Check out #Sa



Finish the post and then click Post.









SEE ALSO:

- Post something to everyone <u>http://office.microsoft.com/redir/HA102785948.aspx</u>
- Add features to a newsfeed post <u>http://office.microsoft.com/redir/HA10278575.aspx</u>
- Follow tags to get information about topics that interest you <u>http://office.microsoft.com/redir/HA102785925.aspx</u>
- Follow people to keep track of their activities <u>http://office.microsoft.com/redir/HA102785944.aspx</u>
- What items appear in your newsfeed <u>http://office.microsoft.com/redir/HA102785941.aspx</u>







SYNC SHAREPOINT LIBRARIES TO YOUR COMPUTER USING SKYDRIVE PRO

If you have Office 2013, or an Office 365 subscription that includes Office 2013 applications, you can sync your SkyDrive Pro and other SharePoint libraries to your computer. You can then work with your library files directly in your file system, and have access to your files when you're offline.

SYNC YOUR SKYDRIVE PRO LIBRARY

- 1. Go to your **SkyDrive Pro** library.
- 2. Click Sync at the top of the page.

Newsfeed	SkyDrive	Sites	 Rob Young 🗸	ø	?
				ync J	[□]

In the SkyDrive Pro wizard, click Sync Now.

Click Show My Files to go to the synced library folder.

SYNC A TEAM SITE LIBRARY

Go to the team site library you want to sync and then do steps 2-4 described above.

FIND SYNCED LIBRARIES IN YOUR FILE SYSTEM

- 1. Open Files Explorer.
- 2. Look under favorites.
- Your SkyDrive Pro library folder is placed under Favorites as SkyDrive Pro, or SkyDrive @Organization:

🛞 🎯 👻 🕆 퉬 🕨 Rob Young 🕨	SkyDrive @ Contoso Corp
🔺 🔆 Favorites	Name
Desktop	🌏 Personal
🐌 Downloads	🌏 Shared with Ev
🔛 Recent places	😼 Australia Sales
le SkyDrive	🛞 Boston Legal C
5 SharePoint	8 Legislative Prov
🝊 SkyDrive @ Contoso Corporation	🚮 October Litwar

Team site library folders are placed under Favorites in the SharePoint folder:

🕘 👻 ↑ 🚺 🕨 Rob Young 🕨 S	SharePoint
⊿ 🔆 Favorites	Name
Desktop	✓ Sproposals - Documentation
🐌 Downloads	ಶ Sales Team Site - Documents
🔛 Recent places	
🗥 SkyDrive	
5 SharePoint	
🝊 SkyDrive @ Contoso Corporation	

DO SHAREPOINT ACTIVITIES WITH YOUR SYNCED FILES

- 1. Open the synced library folder in your file system.
- 2. Right-click a file, click **SkyDrive Pro**, and then click a menu option:
 - a. Select **Go to Browser** to see the selected file on the SharePoint site in a Web browser.
 - b. Select **Copy link** to copy the file's Web URL in order to paste the link in another location such as an email.
 - c. Select **Share...** to open the **Share** dialog box on the SharePoint site in order to send an invitation to share the file with other people.







MANAGE SYNCED SHAREPOINT LIBRARIES

1. Click the SkyDrive Pro icon in the Windows taskbar.



SEE ALSO:

- Sync a library to your computer <u>http://office.microsoft.com/redir/HA102832401.aspx</u>
- Find libraries you've synced on your computer <u>http://officecms/sites/preview/search/redir.aspx?AssetId=HA102849774&lc=en-us</u>

Quick Reference

Card

- Manually sync a folder your syncing with a SharePoint library <u>http://office.microsoft.com/redir/HA102849774.aspx</u>
- Stop syncing a folder with a SharePoint library http://office.microsoft.com/redir/HA102850041.aspx
- Share files in a folder you're syncing with a SharePoint library http://office.microsoft.com/redir/HA102780982.aspx



Tel.: 877-788-1617





CREATE AND MANAGE A SHAREPOINT BLOG

You can create a SharePoint blog to quickly share ideas and information in an informal way.

HOW DO I CREATE A BLOG?

Open your SharePoint site.

On the **Settings** and menu, click **Site contents**.

nin	Jon Doe 👻	ø
Sh	ared with	
Ed	it page	
Ad	d a page	
Ad	d an app	
Sit	e contents	
Ch	ange th e rook	onteni
Sit	e settings	
Ge	tting started	
Of	fice 365 Settin	igs

Click new subsite.

Enter a title, description, and URL. Under **Select a** template, select **Blog**.

elect a template		
Collaboration	Enterprise	Duet Enterprise
Team Site		
Blog		
Project Site		
Community Si	te	
A site for a perso	n or team to p	oost ideas, observations, and expertise that site visitors
can comment on		

Click OK.

CREATE A POST

1. On the home page of the SharePoint blog, under **Blog tools**, click **Create a post**.

Blog tools
Create a post
Manage pools
Manage comments
Manage categories
Launch blogging app
Change post layout:
Basic 💌

Enter a title, and an optional description.

In the **Category** section, select as many categories as you want the post to be associated to, and click **Add**.

Enter a publish date.

Click Publish.

ADD CATEGORIES

- 1. On the home page of the SharePoint blog, under **Blog tools**, click **Manage categories**.
- 2. Click new item.

Type a category name, and click Save.



Quick Reference Card

Tech Tips by MESSAGE @PS

BREAK INHERITANCE FROM THE PARENT SITE FOR A BLOG

- 1. Open your SharePoint blog.
- 2. On the Settings 🍄 menu, click **Site settings**.
- 3. Under Users and Permissions, click Site permissions.
- 4. On the **Permissions** tab, click **Stop Inheriting Permissions**.



Click **OK**.

CREATE UNIQUE PERMISSIONS FOR LISTS AND LIBRARIES IN A BLOG

1. Open the SharePoint blog.

On the Settings 🤷 menu, click Site contents.

Click on the ellipsis next to Posts and then click Settings.



On the Settings page, click Permissions for this list.

Permissions and Management

Permissions for this list

- Workflow Settings
- Information management policy settings
- Enterprise Metadata and Keywords Settings
- Generate file plan report

On the **Permissions** tab, click **Stop Inheriting Permissions**.

Click **OK**.

You can now add users and groups, and give them specific permissions. To do that, click **Grant Permissions**, on the ribbon.

Enter a user or group name, or email address.

Click **Show Options**, and then select a permission level from the dropdown. Then click **Share**.









CHANGE A BLOG POST LAYOUT

On the home page of your SharePoint blog, under **Blog Tools**, select a post layout.

Blog tools
Create a post
Manage posts
Manage comments
Manage categories
Launch blogging app
Change post layout:
Boxed 💌
Basic
Boxed
Inline 😼

SEE ALSO:

Introduction: Control user access with permissions
 http://office.microsoft.com/en-us/support/introduction-control-user-access-with-permissions-HA102771919.aspx

Quick Reference

Card

What is permissions inheritance?
 <u>http://office.microsoft.com/en-us/office365-sharepoint-online-enterprise-help/what-is-permissions-inheritance-HA102772762.aspx</u>







CUSTOMIZE YOUR PUBLIC WEBSITE

This course teaches you how to change the design and layout of your public site. You'll also learn to add your company logo, customize the footer and site navigation, and fine tune your design by customizing the cascading style sheet.

CHANGE THE LOOK

1. Click the Site tab.



Click Change the Look.

Choose a design.

Change the background picture.

Change the color.

Choose the site layout.

Choose the font.

Click Try it out to preview your changes.

When satisfied, click Keep it.

CHANGE THE TITLE AND LOGO

- 1. Click the Site tab.
- 2. Click Edit Title.
- 3. Replace the default title with your own, and then click **OK**.
- 4. Click the Site tab.
- 5. Click Change Logo.
- 6. Click From Computer to upload a logo image.
- 7. Type a description.

Click OK.

CHANGE THE PAGE NAVIGATION

- 1. Click the **Site** tab.
- 2. Click Edit Menu (or click Edit Links on the page).
- 3. Make the desired changes.
- 4. Click Save.

CUSTOMIZE THE HEADER AND FOOTER

- 1. Click the Site tab.
- 2. Click Edit Site Elements.
- 3. Make the desired changes.
- 4. Click Save.

CUSTOMIZE THE CSS

1. Click the Site tab.

Click Edit **Style Sheet**. Make the desired changes. Click **Save**.







CREATE AND CUSTOMIZE PAGES ON YOUR PUBLIC WEBSITE

Your public website in Office 365 includes web pages that you can customize by adding your own page content, including text, images, videos, and apps. This course teaches you how to add and customize pages, manage pages, and create and manage blog posts.

ADD A PAGE

 From anywhere within your public website click Page->New.

Office 365	.gc			
BROWSE PAG	SITE			
Edit Save and N Publish	ew Preview	Edit Properties +	Revert	P. Lay
Edit		N	lanage	Page

Give the page a name and click Create.

Click Format Text \rightarrow Save to save the draft.

EDIT A PAGE

- 1. Navigate to the page on your public website that you want to edit.
- 2. Click the Page tab and choose Edit.



UPLOAD AN IMAGE FROM YOUR COMPUTER

- 1. Navigate to the page on your public website where you want to add an image.
- 2. Click Insert->Picture->From Computer->Browse.
- 3. Select the desired picture and click Open.

HIDE LINKS IN THE NAVIGATION

- 1. From within the navigation on your public website, click **Edit Links**.
- 2. Click the Hide icon.
- 3. Click Save.

DELETE A PAGE

- 1. Navigate to the page on your public website that you want to delete.
- 2. Click **Page** → **Delete Page**.
- 3. Click **OK** to confirm.



Quick Reference

Card



CREATE NEW BLOG POSTS USING THE BLOG POST EDITOR

- 1. Click the BLOG link on your website.
- 2. Under Blog tools, click Create a post.
- 3. Enter a title and body content, including text, images, videos, etc.
- 4. Select a category and publishing date.
- 5. Click Publish.



CREATE NEW BLOG POSTS WITH MICROSOFT WORD

- 1. Click the Blog link on your website.
- 2. Under Blog tools, click **Launch blogging app**. Register the blog account if prompted.
- 3. Click the **Blog Post** tab and choose **Publish**.







ORGANIZE AND CONFIGURE A SHAREPOINT LIBRARY

There are several ways to organize and manage your SharePoint libraries. This intermediate course teaches you how to create and use folders, sort and filter with columns, create custom views of items in the library, and how to restrict access to a library.

CREATE FOLDERS IN A LIBRARY

- 1. Navigate to the library you want to create a folder in.
- 2. On the Files tab, choose New Folder.
- 3. Enter a name for the folder and choose **Save**.



ADD COLUMNS TO A LIBRARY

- 1. Navigate to the library you want to add columns to.
- 2. On the Library tab, choose Library Settings.
- Scroll down to the Columns section and choose Add from existing site columns.

4. Under **Available site** columns, choose and add the columns you want in your library, and then choose **OK**.

s >	Sales Team Site 🖉 e	Add Columns	from Si	ite Columns	50
Home Notebook	Select Columns Select which site columns to add to this list.	Select site columns from: All Groups			
Contentions Construction contracts Contacts Sales Team Tasks Important announcements Contoso Sales Team Calendar Site Contents		Available site columns: Date Picture Taken Department E-Mail E-mail 2 E-mail 3 End Date Enterprise Keywords Event Address Event Address Event Address Event Address Forout: Core Task and Issue Colum	Add > < Remove	Colums to add: Assigned To Due Date	
🖋 EDIT LINKS	Options	Add to default view			
		P. Add to default view		OK Cancel	

CREATE A CUSTOM VIEW OF ITEMS IN YOUR LIBRARY

- 1. Navigate to the library you want to create a view for.
- 2. On the Library tab, choose Create View





Quick Reference Card



If you want to start from an existing view, choose the view under **Start from an existing view**.

On the **Settings** page, type a name for the view.

Choose **Create a Personal View** in the **Audience** section if you don't want others to use this view.



CREATE A CUSTOM VIEW OF ITEMS IN YOUR LIBRARY (CONT.)

- 1. Under the **Filter** section, choose **Show items only** when the following is true.
- 2. In the field drop down box, select the column you want to add, Due Date for example.
- 3. In the next field, choose a condition such as is equal to, for example.
- 4. In the next field, enter a date you will later filter by, such as 11/15/2014, for example.

∃ Filter		
how all of the items in this view, or display a ubset of the items by using filters. To filter on a olumn based on the current date or the current ser of the site, type [Today] or [Me] as the olumn value. Use indexed columns in the first lause in order to speed up your view. Filters are	Show all items in this view	
	Show items only when the following is true	:
particularly important for lists containing 5,000 or	Show the items when column	
more items because they allow you to work with large lists more efficiently. Learn about filtering items.	Due Date	
	is equal to	
	11/15/2014	
	O And Or	
	When column	
	None	
	is equal to	

- Finally, in the **Folders** section of the page, choose **Show all items without folders**. This option enables you to look at files across folders in a library.
- Choose **OK**. The new view appears displaying all files having 11/15/2014 under the **Due Date** column, regardless of what folder they are in.

CONTROL WHO HAS ACCESS TO YOUR SHAREPOINT LIBRARY

- 1. Navigate to the library you want to share with colleagues.
- 2. On the Library tab of the ribbon, choose Library Settings.
- 3. On the **Settings** page choose the **Permissions** for this document library link.
- 4. If the library inherits permissions from a parent site, choose **Stop Inheriting Permissions** on the **Permissions** tab.

Office 365	Outlook	Calendar	People	Newsfeed	SkyDrive	Sites		Rob Y	oung +	ø	?
BROWSE PERMISSIONS							€	SHARE	☆FOL	LIOW	$[\Box]$
Manage Stop Inheriting Permissions	ns										
Home	<u>_!</u>	∖ This libra	ary inherits	s permissions	from its p	arent. (Ro	b You	ng)			ĺ
Documents		Name				Туре	Per	rmission L	evels		
Recent		All Users (m	iembershi	p)		Domain Group	Co	ntribute			
Construction contracts Contacts		Everyone e	cept exte	mal users		Domain Group	Re	ad			=
Sales Team Tasks		Rob Young				User	Fu	ll Contro	d		
Important announcements											
Contoso Sales Team Calendar											
Site Contents											
•											+

Click **OK** on the message that appears.

- In the **Share** dialog box, type the names or email addresses of those who will have access to the library.
- Optional: Add a short message to tell them about the library, and then select **Share**.
- To remove permissions that existed before you stopped inheriting permissions, select those groups or users and then choose **Remove User Permissions**.







IMPORTANT: Make sure you have permissions to your own library.

Office 365 Out		Outle	ook	Calenda	r People	Newsfeed	SkyDrive	Sites		Rob Y	oung +	ø	?
BROWSE	PERMISSION	5							G) share	☆FOL	LOW	[0]
Delete unique permissions	Grant Permissions	Edit User Permission	Rer ns Pe	move User rmissions	Check Permissions								
Inheritance	Grant	N	lodify	1	Check								
Home Notebook				▲ This	library has	unique permi	ssions.			Description		_	
Documents			Name				Iy	pe	Permis	sion Level	s		
Recent			All Users (membership)			Do	omain oup	Contr	ibute				
Construction contracts Contacts		acts	[Everyone except external users			Do	, main	Read			=	
Sales Team Tasks			[Pavel Bansky			Us	er	Edit				
Important announcements			[🔲 🔳 Rob Young			Us	er	Full C	ontrol			
			[Sara Davis				Us	er	Edit			
Contoso S Calendar	ales Team												
Site Conte	nts												•
					111								

Now, only the people that you added in the **Share** dialog have access to the documents in the library.

SEE ALSO:

- Sync a library to your computer
 <u>http://office.microsoft.com/en-us/support/sync-a-library-to-your-computer-HA102832401.aspx</u>
- Manage lists and libraries with many items
 <u>http://office.microsoft.com/en-us/office365-sharepoint-online-enterprise-help/manage-lists-and-libraries-with-many-items-HA101967267.aspx?CTT=1</u>



Quick Reference Card

Tech Tips by MESSAGE

POST TO A TEAM SITE FEED

Some posts or conversations are better suited for a small group of people, rather than the newsfeed on your personal site. For these cases, you can create or start following team sites that contain their own site feeds. For convenience and visibility, posts on team sites you're following also appear in the newsfeed on your personal site.

NOTE Tasks described in this article may depend on your SharePoint permissions. For more information, see your administrator.

CREATE A TEAM SITE

1. Click **Sites** at the top of the page.



Click New Site.

Enter a name for the new site and click **Create**. The site appears after a few moments. You automatically follow new sites you create.

INVITE PEOPLE TO A TEAM SITE

- 1. Go to the team site.
- 2. Click **Share** at the top of the page.



In the **Share** window, enter the names or email addresses of the people you want to invite to the site.

Accept the default **Contribute** permission so that people can post to the newsfeed.

Share 'Sales Team Site'	
Shared with lots of people	
Invite people to ' <u>Contribute'</u> They'll also get access to the 'Rob Young' site and the sites that share permissions with it.	
Zrinka Makovac × Molly Dempsey × allieb@contoso.com ×	
Let's discuss details of our project on the new Sales Team Site!	
SHOW OPTIONS	
Share Cancel	

Click Share.



Quick Reference

Card



START FOLLOWING A TEAM SITE

Following a site enables you to find it easily later on your Sites page. It also lets you post to its site feed from your personal site newsfeed.

- 1. Go to the site you want to start following.
- 2. Click **Follow** at the top of the page.



POST TO A SITE FEED WHILE VISITING A TEAM SITE

- 1. Go to the team site.
- 2. Find the **Newsfeed** web part on the team site **Home page**.

Newsfeed	
Start a conversation	

Create the post just as you'd create posts in your personal site newsfeed.

SEE ALSO:

- Post something to a small group of people <u>http://office.microsoft.com/redir/HA102886562.aspx</u>
- Add features to a newsfeed post <u>http://office.microsoft.com/redir/HA102785751.aspx</u>
- Create a site <u>http://office.microsoft.com/redir/HA102773285.aspx</u>
- Share a site <u>http://office.microsoft.com/redir/HA103456668.aspx</u>

POST TO A TEAM SITE FEED FROM YOUR PERSONAL SITE NEWSFEED

1. Click **Newsfeed** at the top of the page.

Newsfeed	SkyDrive	Sites	 Rob Young 👻	ø	?
5					

Select the site feed you want to post to from the dropdown menu.

Share with everyone -							
Start a conve	everyone						
Following	Sites I'm following	lentions					
1 Ollowing	Gear Specs	nentions					
★ Rob Young	Sales Team Site	'eam Site.					

Create the post. The post appears with a reference to the team site it's associated with.









We hope you enjoyed The SharePoint Online and 2013 Quick Reference Guide. To view other resources in our Tech Tips by MessageOps series, visit our website

http://www.messageops.com/documentation



