QUICK SHEET: SharePoint Teams Site Basics

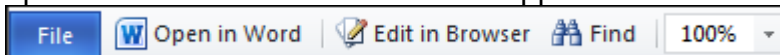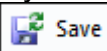|	
Browser Settings http://technet.microsoft.com/en-us/library/cc263526.aspx	• For the most functionality, use the latest version of **Internet Explorer**. • Using Chrome, Firefox, and Safari may provide limited access.
Avoiding multiple logins *To avoid logging in multiple times, add the SharePoint domain (https://teams.stonybrook.edu) to your Local Intranet Zone Sites on your Internet Explorer browser.*	1. In Internet Explorer, go to **Tools > Internet Options** 2. Click on the **Security tab** 3. Click on the **Local Intranet** zone icon and then the **Sites** button. 4. Click the **Advanced** button. 5. Click the **Add** button to add the site: https://teams.stonybrook.edu and https://ecteams.stonybrook.edu . 6. Click the **Close** button; then **OK** and **OK**.
Logging in with your NetID	Username: sunysb.edu\NetID *Be sure to use the backslash " \ " above the Enter key* Password: Your NetID password.
The *Ribbon*	If you use MS Office applications such as Word and Excel you are already familiar with the *Ribbon*. In SharePoint the *Ribbon* changes depending on where working. For instance, when you are in a Document Library you will have tools for working on documents and tools for managing the Library. In a List you will have tools for managing the list and tools for working with items in the List. • Click the tab to the right of **Browse** to view the tools on the *Ribbon*.

Document Libraries
 	
A document library is a place to store files for others to access and edit.
	View a document by clicking on it.
	   ○ If it is a MS Office document and the Office Wed App feature is enabled for this Library, the document will open directly in SharePoint. Otherwise, the document will open in the associated application.
	   ○ With the Office Web App feature multiple users can edit the document at the same time.
	     ▪ To edit a document click on "**Edit in Browser**". Your changes will be saved automatically.
	   ○ Certain formatting may not appear in Edit in Browser view and the tools on the Office Ribbon are limited. To work around this open the document in its application.

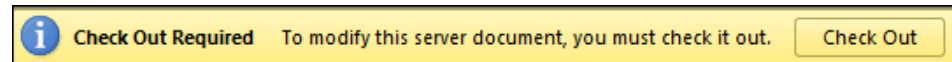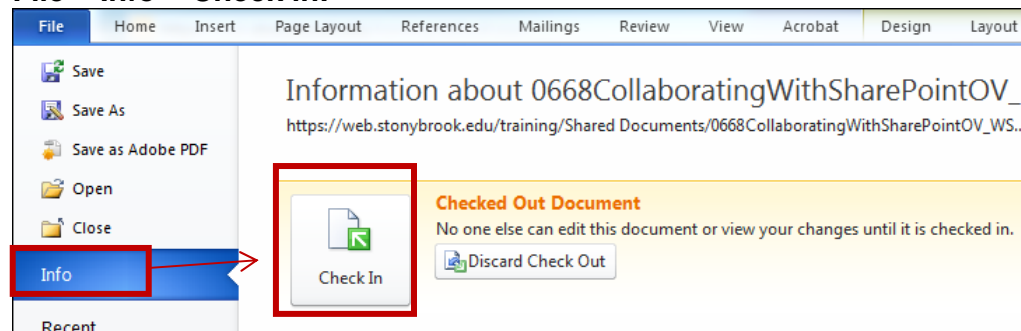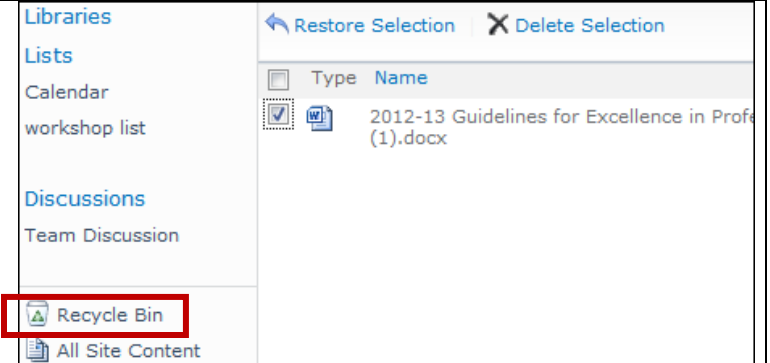|	
	▪ For more functionality, click on "**Open in Word, Excel, PowerPoint, etc**" button. This will open the document in its associated application. `File` `W Open in Word` | `📝 Edit in Browser` `🔍 Find` `100% ▾` If you are editing in the associated application remember to click **File > Save** to save the document back to the SharePoint site. There will not be a copy of it on your computer. • Note: the green arrows on the save button: `💾 Save` This lets you know that you are saving the document onto the SharePoint site *(in the cloud)*. To add a document to the Library click **+ Add document**.
Checking out a document to edit it *Some document libraries require you to check out a document prior to editing it. This prevents users from working on the same document at the same time.*	To check out a document, you must open the document in its application (not the browser). 1. Click on the document in SharePoint and click the button "**Open in Word [etc.]**" (*not Edit in Browser). 2. Select "**Check out and Edit**". • If you select "**Use my local drafts folder**". This will save a copy of the document to your computer. This document will stay on your computer until you check it back in. *If you view a document first (in the application) and then decide to check it out and edit it, there will be a Check out button on the document: `ℹ Check Out Required  To modify this server document, you must check it out.  [ Check Out ]` `📄` The green arrow icon before the document means it is checked out.

Checking in a document
 	
If check out is required to edit a document, then you must check the document back in for others to see the changes.
	In the document's associated application (Word, Excel, PowerPoint, etc), check in the document under **File** > **Info** > **Check in**:
	
	`File  Home  Insert  Page Layout  References  Mailings  Review  View  Acrobat  Design  Layout`
	`💾 Save`
	`📄 Save As` Information about 0668CollaboratingWithSharePointOV_...
	`📄 Save as Adobe PDF` https://web.stonybrook.edu/training/Shared Documents/0668CollaboratingWithSharePointOV_WS...
	`📂 Open`
	`📁 Close` **Checked Out Document**
	`Info` No one else can edit this document or view your changes until it is checked in.
	`📄 Check In` `📄 Discard Check Out`
	`Recent`
	
	The **Discard Check Out** button - If you checked out a file (whether you made changes to it or not), you can discard this check out if you decide not to use it. All changes you made to the document will be lost.

Deleting a document	Hover over the document name > click the downpointing arrow (▼) > click **Delete**

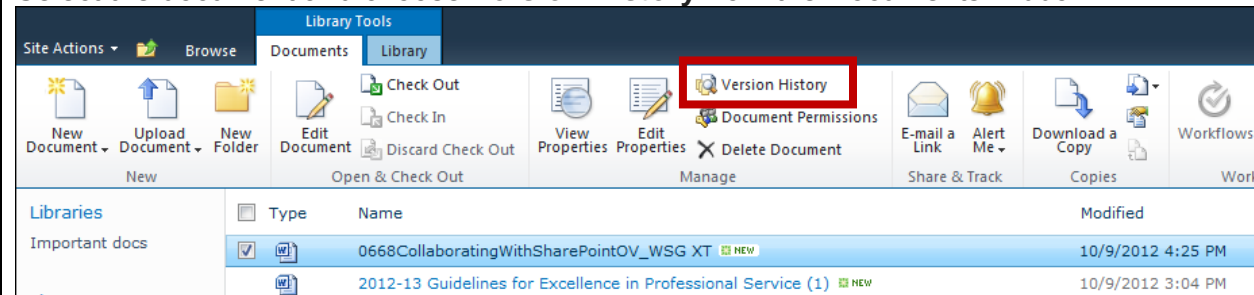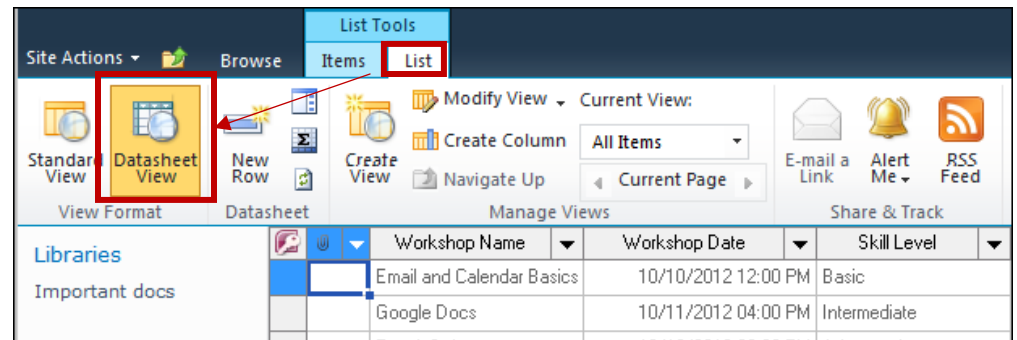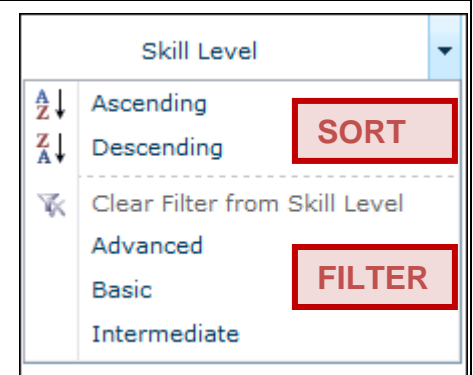|	
Finding a deleted document	In the Quick Launch (in the left pane of the SharePoint site) click on **Recycling Bin** to access all deleted documents. • **Restoring a document**: Select a document by putting a check next to it and clicking **Restore Selection**. • **Deleting a document completely**: Select the document and click **Delete Section**. This document will not be recoverable.
Accessing a previous version of a document	If versioning is enabled, you can access a previous version of a document by hovering over the document, clicking the down-pointing arrow (▼) and then choosing a previous version. **OR** Select the document and choose **Version History** from the Documents Ribbon:
List basics *SharePoint lists store and display many different types of data.* *For example, it can be a list of projects being worked on by different people in your department, a list of links, a list of vendors and their contact information, a task list, etc.*	Click on the **name** of this list to view the list items. Add an item to the list by click on **+ Add new item**. **OR** Click the **List** tab in *List Tools* > **Datasheet view** to enter items directly into the list. Datasheet view allows you to tab over to the next cell. Datasheet view is especially useful for editing many items in a list. *Datasheet view may not work using the 64-bit version of Office 2010. Download this plugin to be able to use Datasheet view: http://www.microsoft.com/en-us/download/details.aspx?id=23734. *Datasheet view may not work if you are using a Mac.

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Sorting and filtering list items	In either Standard View or Datasheet View, you can sort and filter list items. Simply hover over a column name > click the downpointing arrow (▼) > choose whether to: • Sort the items in Ascending (A to Z) or Descending (Z to A) order • Filter by the data given *To clear out the filter, click **Clear Filter from [*column name*]** Skill Level A↓ Ascending **SORT** Z↓ Descending K Clear Filter from Skill Level Advanced Basic **FILTER** Intermediate

Creating a Custom View for your list
 	
You can customize any list to display only the content you want to see. This is especially useful if the list has many columns and lots of data but you only want to see a portion of this data.
 	
You can make this list view public for all users of the site or private just to you. And you can designate if this view should be the default view.
 	
http://youtu.be/Z3AaQT4B-NM
	Click on the **name of the list** to begin
	1. Click on the **List tab** under *List Tools*
	2. Click **Create View**. There are 6 format types. Choosing Standard view will allow you to scale down the current list to just the columns you want to see.
	3. Using Standard View format as an example, you can
	
	List Tools
	Items List
	Show Task Pane Modify View Current View:
	Show Totals Create Column All Items
	Refresh Data Create View Navigate Up Current Page
	Datasheet Manage Views
	
	   • Name: give this new view a name and make this the default view (or not)
	   • Audience: choose whether this is a public or private view and then choose which columns to display (Column Name) and in what order (Position from Left)
	   • Sort a column in ascending or descending order.
	   • Filter based on data in any of the columns in the list regardless if you choose to display them or not in your view. For example, you may choose to filter by a column of numbers but only display data that is greater than a specific amount. To turn on a filter like this select "Show all items only when the following is true" and then select your criteria. To turn on the filter in this view select "Show all items in this view".
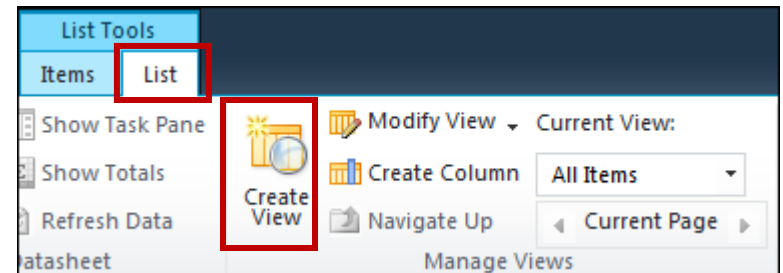	
	Best Practice: Don't make your custom view public until you've viewed and perfected it. To edit the list, click on the **List tab** under *List Tools* > **Modify View**.

Managing the Alert Me function.
 	
Any changes made to a document, document library, list or discussion board will send you an email alert of the changes.
	Alert Me of changes on a document:
	    Select a document in the document library > click the **Documents tab** in *Library tools* > click **Alert me** > "**Set Alert on this Document**". Choose your settings and then click **OK**.
	
	Alert Me of changes on a document library:
	    Click on the **name of the library** > in *Library Tools* click the **Library tab** > **Alert me** > "**Set Alert on this Library**".
	
	Alert Me of changes on a List item:
	    Click on the **name of the list** > in *List Tools* click on the **List tab** > **Alert me** > "**Set Alert on this list**".
	
	Alert Me of changes on a List, Discussion Board or any type of Web Part:
	    Click on the **name of the Web Part** > in *List Tools* click on the **List tab** > **Alert me** > "**Set Alert on this List**".