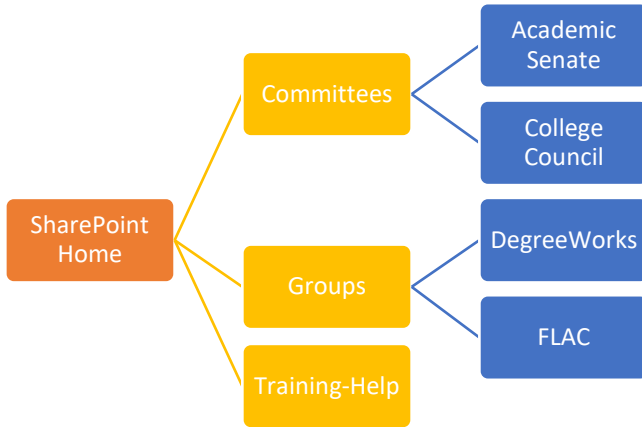# SharePoint Quick Reference

SharePoint Concepts

What is SharePoint?
SharePoint is a suite of web-based tools for collaboration, file sharing, searching, data extraction and report creation.

Site Collection

Terms
- **Site** – Container for content. Each site can contain:
  - **Pages** – webpage housing **Web Parts** (custom objects)
  - **Libraries** – collection of files (e.g. docs, PDFs, etc.)
  - **Lists** – collection of data (e.g. calendars, contacts, etc.)
- **Site Collection** – Multiple "containers" w/top-level site (Home) and sub sites (e.g. Committees, Projects, Help, etc.)
- **Metadata** – searchable data about a file (e.g. author, date last modified, ACCJC standard, etc.)
- **View** – custom display of list or library contents using metadata to sort and/or filter.
- **Alert** – notification, auto-generated, at any change to a list or library
- **Ribbon** (top of window) changes based on object selected

NOTE: Folders are unnecessary. Keep all documents in a single library; use different views to list only those documents that meet specific criteria.
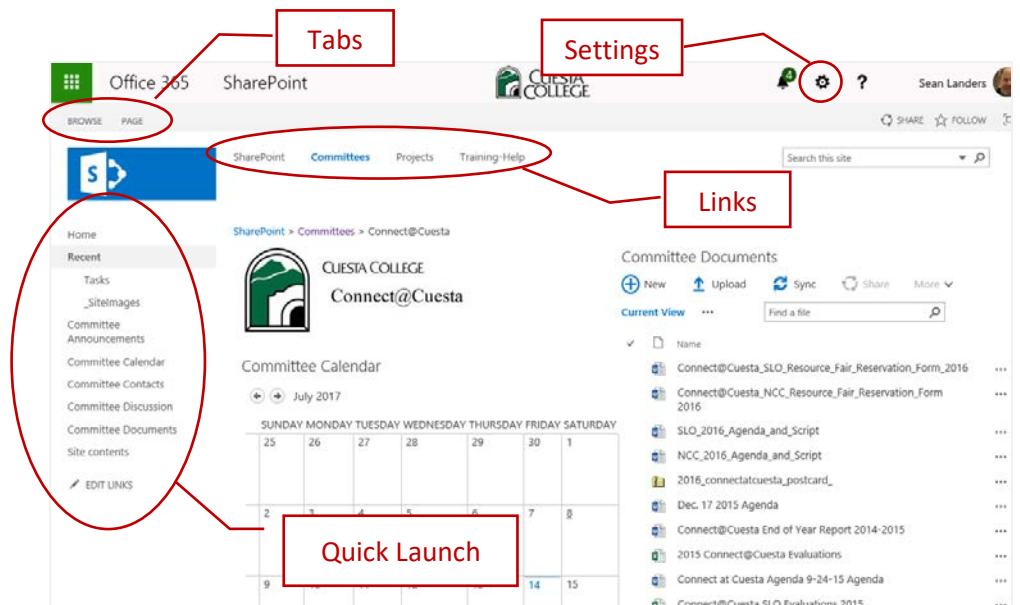
Access SharePoint
1. Log into Office 365:
   a. Launch a browser.
   b. Go to https://portal.office.com.
   c. Log in with your Cuesta email address and password.

2. Click on the **SharePoint** icon.
3. Select from "Frequent Sites" or click **Team Site** under "Featured link" (on the left)

Log Off SharePoint
1. Click the *[your name]* link at the top-right of the page.
2. Click **Sign Out**.

Navigation

Navigate
- **Links bar**

  Click a shortcut on the Links bar to go directly to a second-level site. Click "SharePoint**"** to return to the homepage.
- **Quick Launch**
  - At Home or second-level site – Click a shortcut in Quick Launch to go directly to a specific site.
  - At site – Click a shortcut in Quick Launch to access site contents.

Access Committee Site
1. If necessary, click **SharePoint** or **Committees** in the **Links** bar.
2. Click on the committee name in the **Quick Launch** bar. *The committee homepage will display.*
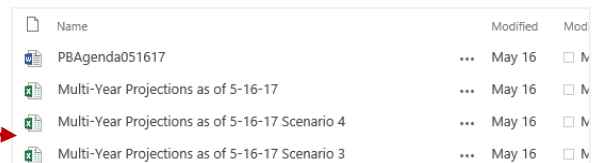
Display Links Bar
Sometimes the Ribbon will hide the Links bar.
- Click **Browse** (Tabs) to display Links bar.

Access Documents

Open a Document
1. Select the desired committee from the **Quick Launch** bar. *The committee's homepage will display.*
2. Click **Committee Documents** in the **Quick Launch** bar.
3. Click on the desired filename. *The document will (usually) display in Office 365.*
4. To exit, click the browser's **Back** button.

Search for Documents
1. Optional: Navigate to the desired committee homepage.
2. Optional: Click on Committee Documents (Quick Launch).
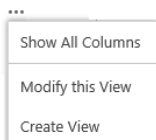3. Type search criteria in the "Find a file" search tool.

- Boolean operators AND, OR, and NOT are supported. *(NOTE: Operators are case-sensitive and must be entered in all CAPS.)*
- Put phrases within quotes. *(Example: "Accreditation Committee Report")*
- Use the asterisk (*) as a "wildcard". *(Example: entering "slid*" will find slid, slide, and sliding.)*
4. Press **[Enter]** to start the search. *SharePoint will search the contents of files as well as file names, listing files that meet the search criteria.*
5. Click the **X** in the search tool to clear the search results.

Search Miscellaneous
1. Optional: Navigate to the desired committee homepage.
2. Click the dropdown arrow in the "Search this site" search tool.

3. Select the search focus from the dropdown list.
4. Type search criteria in the search tool.
   - Put phrases within quotes.
   - Use the asterisk (*) as a "wildcard". *(Example: entering "Linda D*" will find "Linda Donnelly" and "Linda DiBenedetto")*
5. Press **[Enter]** to start the search.
6. Click the browser's **Back** button to clear the search results.

Change Views
1. Click **Committee Documents** in Quick Launch.
2. Click the desired view (e.g. All Documents, Agenda, Minutes, Show All Columns, etc.) at the top of the file list.
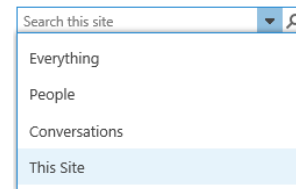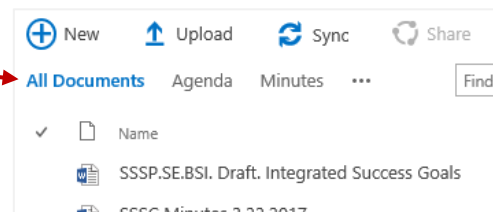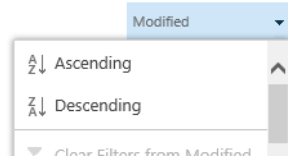
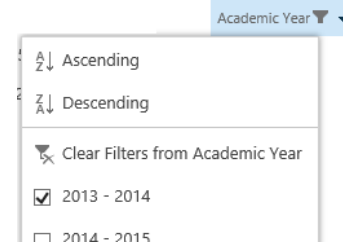*NOTE: Click the ellipsis (…) to select additional views.*

Sort View
1. Click **Committee Documents** in Quick Launch.
2. Click the arrow on a column heading.

3. Select **Ascending** or **Descending**.

Filter View
1. Click **Committee Documents** in Quick Launch.
2. Click the arrow on a column heading.
3. Select the filter value(s) from the dropdown list.

*Note: Select **Clear filter from…** to remove filter.*

Upload Documents

File Name Convention
- Filenames should contain *only* letters, numbers, and underscores.
  - Use underscores instead of spaces.
  - Do not use punctuation or special characters.
- Typically avoid dates and version numbers in filename. *SharePoint maintains versions and last modified dates.*
- Order elements from general to specific.

Example: ProgramReview_DueDateCheck.docx

Upload File
1. Click **Committee Documents** in the Quick Launch bar.
2. Click **Upload** at the top of the document list.
3. Click **Browse** and then locate & double-click on the file.
4. Click **OK**.
5. Complete the form, entering the appropriate metadata.
   - Type desired data or select from list as you type.
   - Click **Browse** button and choose desired option(s).
   - Enter "NA" if no options apply.
6. Click **Check In** at the bottom of the form.

Alerts

Create an Alert
Alerts notify you of changes to a SharePoint item.
1. Locate the item for which you wish to create an alert.
2. Do one of the following:

Document Item	Calendar Item
a. Click the checkbox.	a. Click the event name.
b. Click **Files** tab (on Ribbon).	b. Click **Alert Me** (Actions group on View tab).
c. Click **Alert Me** (Actions group).	
d. Select **Set alert on this document**.	

3. Select options for alert and then click **OK**.

Edit/Remove an Alert
1. Click **Alert Me** on the Ribbon (Files tab, Actions group).
2. Select **Manage my alerts**.
3. Do one of the following:
   - Click on alert name, make changes and then click **OK**.
   - Click alert's check box and click **Delete selected alerts**.
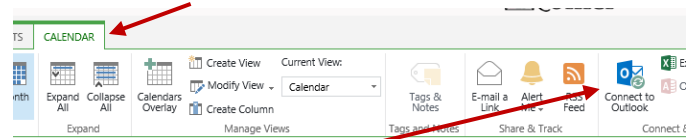
Calendar

Create Calendar Event
1. Click **Committee Calendar** on the Quick Launch bar.
2. Hover over desired date and click the **Add** link that appears.
3. Complete the options for the event.
4. Click **Save**.

Edit/Delete Calendar Event
1. Click **Committee Calendar** on the Quick Launch bar.
2. Click on the event name.
3. Do one of the following:
   - Click **Edit Item** on the Ribbon, make desired changes and then click **Save**.
   - Click **Delete Item** from then Ribbon and then click **OK**.

Sync Calendar with Outlook
1. Click **Committee Calendar** on the Quick Launch bar.
2. Click the **Calendar** tab.

3. Click **Connect to Outlook**.
4. Click **Allow**.
5. Click **Yes**.
   Outlook will open, displaying both personal and SharePoint calendars.

Members

Add Member Info
1. Click **Committee Contacts** on the Quick Launch bar.
2. Click **new item**.
3. Complete the New Item form and then click **Save**.

Modify View
1. Click **Committee Contacts** on the Quick Launch bar.
2. Click the ellipsis (…).
3. Select **Modify View** from the shortcut menu.
4. Select the data and column order (Columns) and row order (Sort), and then click **OK** (bottom of screen).

Edit List
1. Click **Committee Contacts** on the Quick Launch bar.
2. Click "**edit** this list".
3. Do one or more of the following:

Edit	Change existing data in a cell
Add	Add contact data to bottom (empty) row
Delete	Right-click the left-most cell of the contact to delete and select "**Delete**" from the shortcut list.

4. Once done, click "**Stop** editing this list".