

Training Manual

SharePoint Basic Concepts

SharePoint 2013 – GTA Platform

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Support: For further assistance, fill out a Support Request at <http://portal.georgia.gov>

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pg. 1

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1.0 Overview

SharePoint 2013 is a centralized document repository for use on the intranet. The site pages are consistent in look and feel throughout the site. SharePoint 2013 can also be used as a content management tool that will allow users to edit and manage their intranet site.

SharePoint sites can be accessed from the internet from desktop computers, laptop computers and mobile devices. A vpn will not be required when accessing the system. Users who have an Active Directory account on the GTA network will be granted access to the system.

1.1 Intended Audience

The intended audience for this course is all GTA SharePoint site users who want a basic understanding of SharePoint 2013. Mastery of the content in the SharePoint 2013 Basic Concepts will provide a foundation for the user when working with SharePoint 2013.

1.2 System Requirements

For maximum performance, the recommended browser is Internet Explorer 11. The Google Chrome browser is also supported.

If your computer does not have one of the recommended browsers, please contact the Help Desk for assistance

1.3 Terminology

Active Directory – also known as AD, Active Directory is a directory service that is used to enforce security policies for computers.

Content Item – a piece of **content** that is used in your agency’s site and includes a title and other customized fields.

Content Type – columns associated with content: metadata, properties, template, workflows and information management policies

Gold bar – top navigation on the master page that contains tabs linking the user to other pages in the site collection.

Landing page – the web page that is displayed when a visitor clicks on a tab.

Master page – a web page in a site that defines the look, feel and standard behavior of all other web pages in the site.

Metadata – terms used to classify items; also referred to as ‘site columns.’

Quick Launch – links on the left of the page that remains permanently in the layout.

Ribbon – a central place at the top of a SharePoint page to find groups of commands for interacting with SharePoint.

Support Services – the GTA team that manages the GTA help desk for SharePoint 2013 issues.

Support Services is located at:

<http://support.georgia.gov>

URL – a link that is formatted with the web path for accessing a web page.

e.g. GTA’s SharePoint 2013 production site URL is: <https://mygta.ga.gov/>

Apply Your Knowledge: Exercises

Complete **Exercise 1: Overview** in your [SharePoint Basic Concepts: Exercises](#) manual.

2.0 Access SharePoint

2.1 Login

To log in to SharePoint 2013,

1. Enter the URL for the GTA SharePoint 2013 environment in the browser, e.g. for production, enter <https://mygta.ga.gov/>
2. When prompted, enter your network **User name** and **Password**

2.2 Security and Permissions

When logging in, SharePoint will check that you have an Active Directory account. Your Active Directory account will be used to assign you the correct permission levels. All SharePoint users must have an Active Directory account.

There are several different levels of security permissions for each library and list. The SharePoint administrator has full control over the entire site collection and will assign users to groups as appropriate.

Note: If you need help with your site or permissions, please contact the support team at:
<http://support.georgia.gov>

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Support Request

Subject *

Support Type *

- Select -

URL or Page

If applicable.

Support Request in Detail *

Contact Information

Your Name *

Email *

Phone *

CAPTCHA

This question is for testing whether you are a human visitor and to prevent automated spam submissions.



What code is in the image? *

Enter the characters shown in the image.

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1-800-georgia
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Figure 1 Support Page when you contact the support team at: <http://support.georgia.gov>

2.3 Log out

To log out of SharePoint 2013,

1. Click your name in the upper right corner
2. Click **Sign Out**

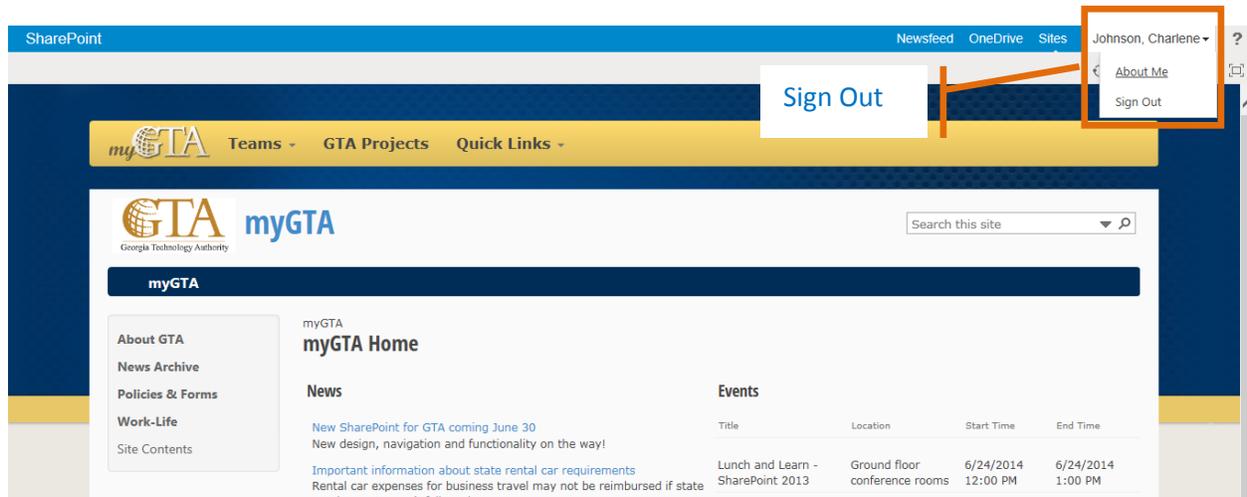


Figure 2 Sign Out when you want to end the session

Apply Your Knowledge: Exercises

Complete **Exercise 2: Access SharePoint** in your [SharePoint Basic Concepts: Exercises](#) manual.

3.0 SharePoint Pages

The SharePoint 2013 architecture is focused on site administration and includes the following:

- A site that contains libraries, lists and settings.
- Pages that contain items stored in libraries and lists.
- Tools for managing the pages, libraries and lists.

Site administration enables management of the site and improves the organization and accessibility to the site content. This will improve the user experience regarding navigation, search, team collaboration and integration with the Microsoft Office Suite: Word, Excel, etc.

Pages, libraries and lists will be managed by content managers.

Note: Technical architecture for SharePoint 2013 is not in scope for this module.

3.1 Home Page

The myGTA home page contains a Quick Launch area on the left navigation that provides links to popular content.

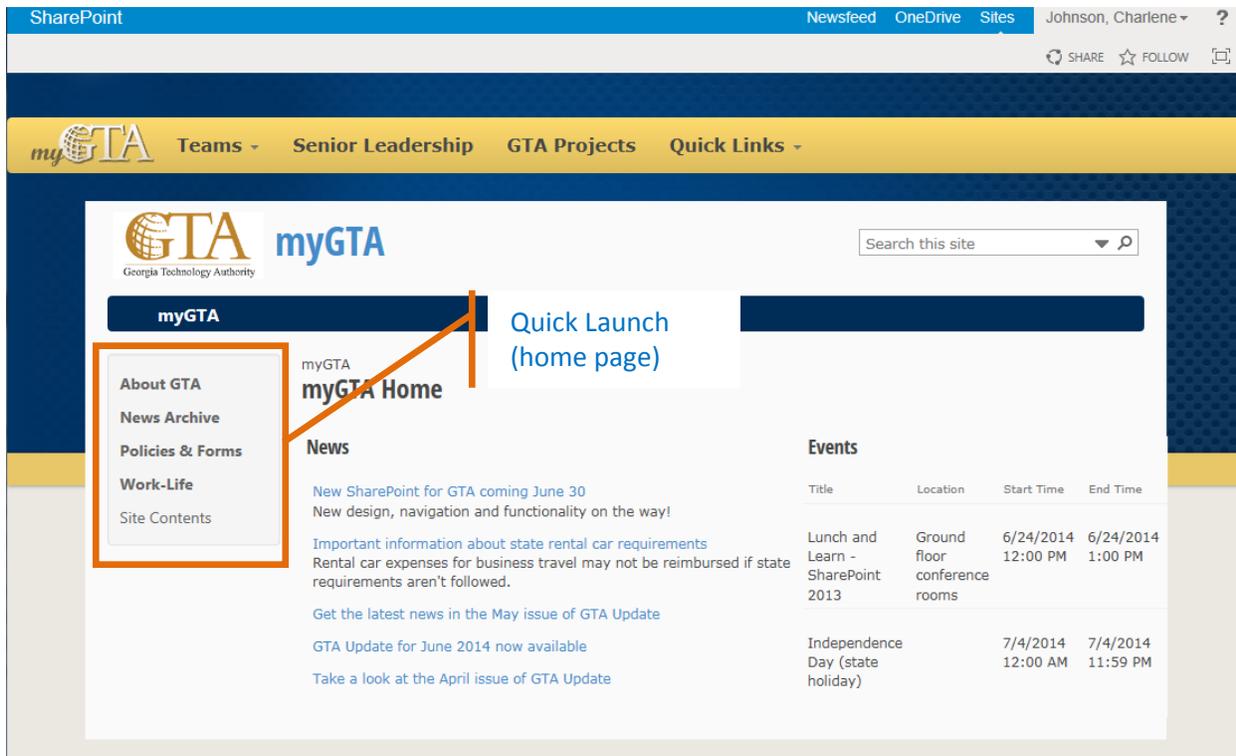


Figure 3 Home Page when you sign in to myGTA

3.2 Landing Page

When you select a tab on the gold bar, the landing page is displayed. The landing page is similar in appearance to the home page and contains the following parts:

- Custom blue bar with additional top navigation tabs
- Custom Quick Launch links on the left navigation
- Content area for the main body of the page

To view the landing page of a site,

1. Select a tab from the gold bar, e.g. Teams
2. If available, select the second level, e.g. Teams > Portal
3. SharePoint will direct you to a page, e.g. the Portal landing page

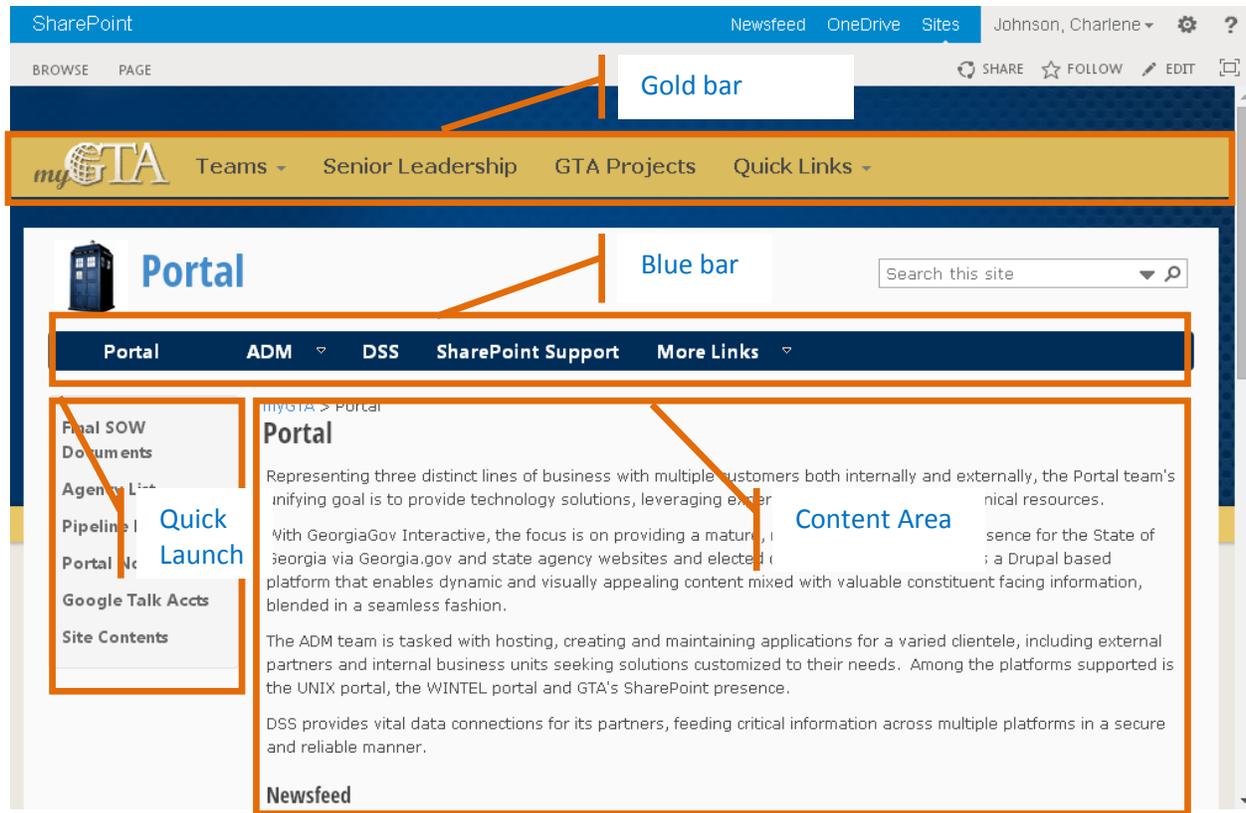


Figure 4 Landing Page when selecting Teams > Portal

3.3 Pages

Pages are containers for library and list content items. A page may also contain navigation links, text and pictures.

If you have sufficient permissions, SharePoint will display **content tabs** related to the page e.g. BROWSE, PAGE, etc.

Note: If you do not have sufficient permissions SharePoint will not display the content tabs for the page.

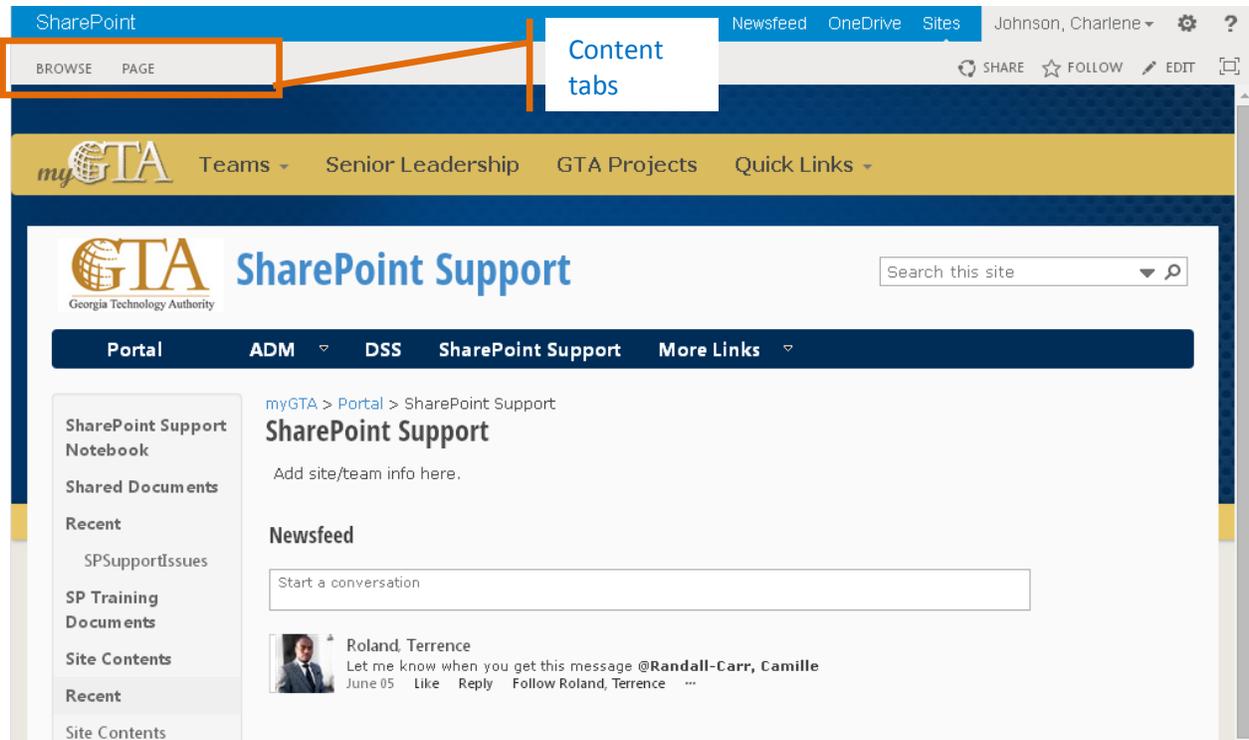


Figure 5 Site Page when selecting SharePoint Support

Apply Your Knowledge: Exercises

Complete **Exercise 3: Navigation** in your [SharePoint Basic Concepts: Exercises](#) manual.

4.0 SharePoint Global Navigation

SharePoint Server 2013 is organized into three distinct hubs: Newsfeeds, OneDrive, and Sites. These hubs are available in a global navigation bar. By using the global navigation bar, you no longer need to specifically visit your My Site in a web browser to access social features. All SharePoint pages contain a global navigation bar that will provide you with links to the following customizable social features:

- Newsfeeds
- OneDrive
- Sites

4.1 Newsfeeds

Selecting **Newsfeeds** on the global navigation bar located at the top right corner of the page, will allow SharePoint to quickly display updates to newsfeeds that you are following. This is the quickest way to stay current regarding new posts.

To view your newsfeeds,

1. Click **Newsfeeds** from the global navigation bar

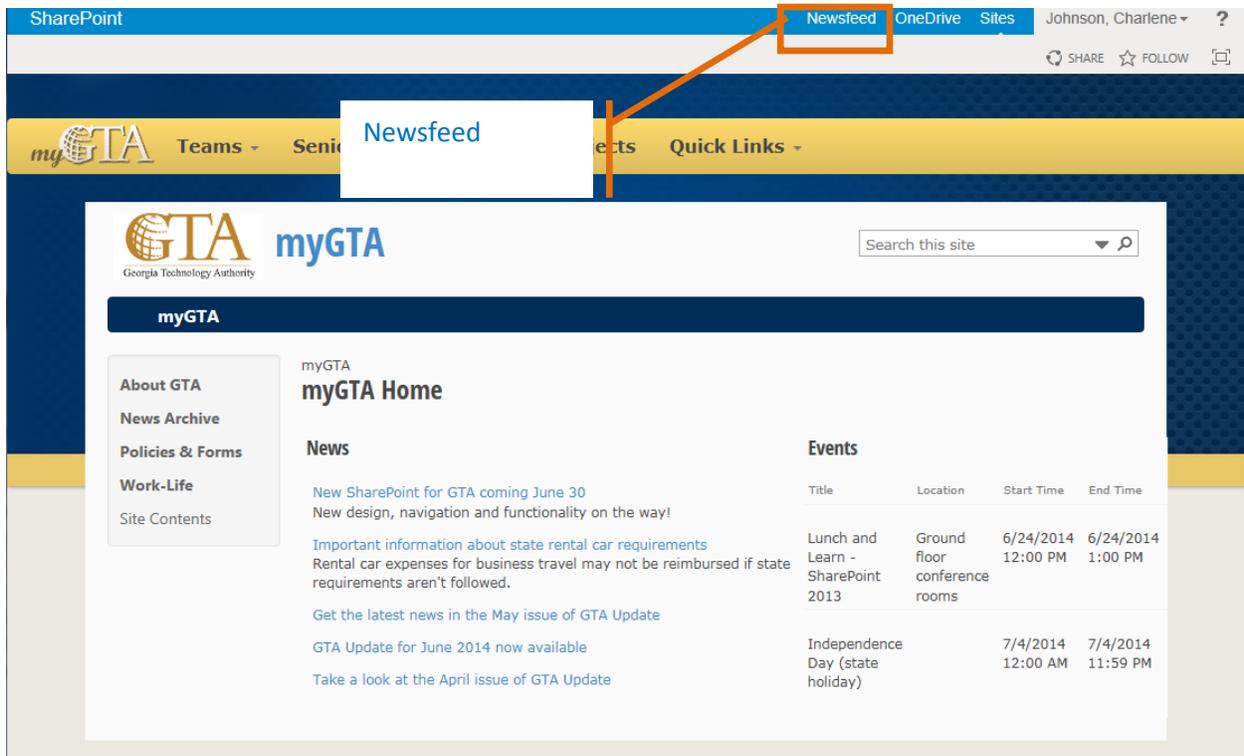


Figure 6 Newsfeed on the global navigation bar

2. SharePoint will display your newsfeeds

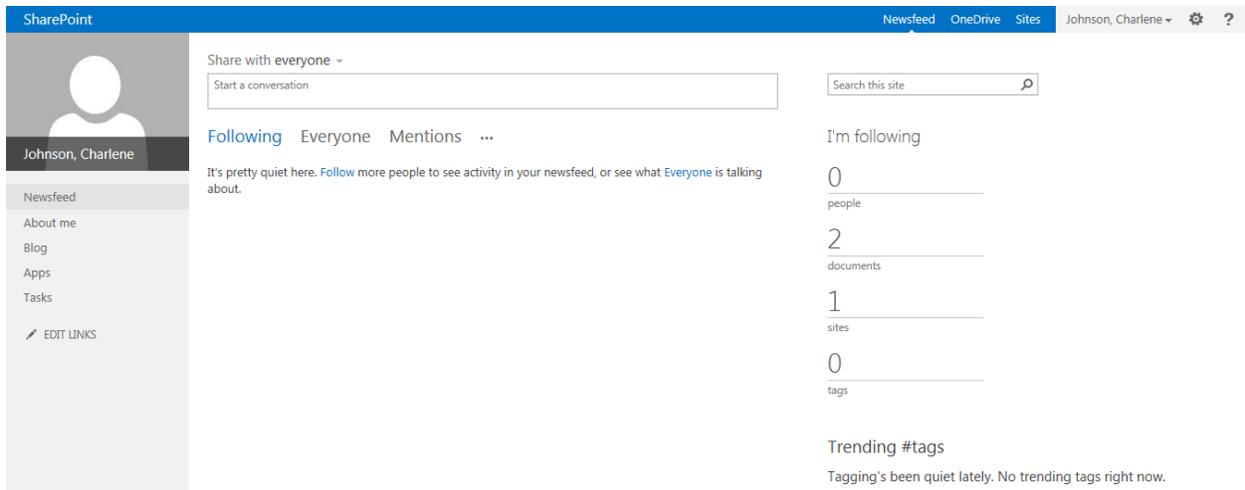


Figure 7 Newsfeeds page when you select Newsfeed on the global navigation bar

4.2 OneDrive

Selecting **OneDrive** from the global navigation bar located at the top right corner of the page, will allow you to take documents offline from document libraries and use them when you are disconnected from the SharePoint Server 2013. When you are reconnected to SharePoint Server 2013, the files will be synchronized by SharePoint.

Some benefits of using **OneDrive** include the following:

- You can take your documents offline and let SharePoint synchronize them when you are online again
- Your documents can be synchronized across all of your devices and servers where the files are stored and synchronized.
- Multiple users (online or offline) can work on documents at the same time, and the **OneDrive** will synchronize the changes between the users. If there are conflicts, users will be prompted to resolve the conflicts.
- Users can work from many locations, either online or offline, and work from many devices.

To access **OneDrive**,

1. Click **OneDrive** from the global navigation bar

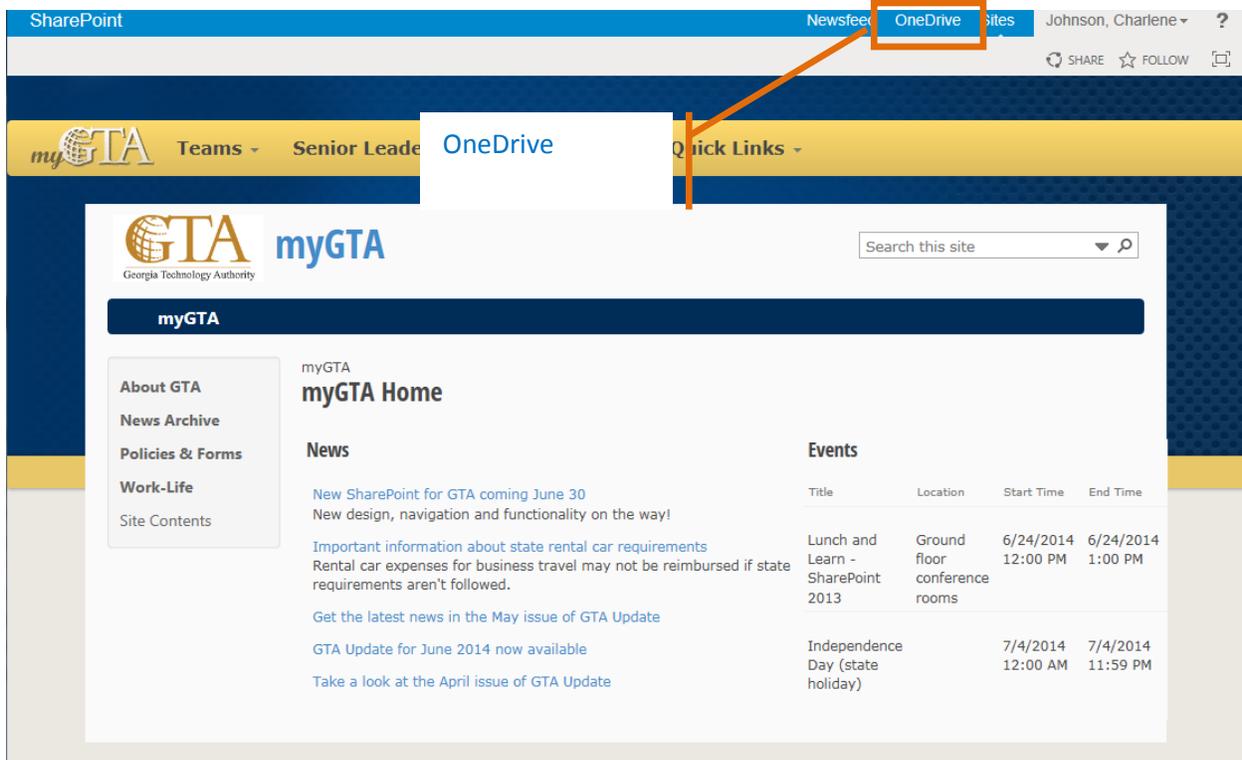


Figure 8 OneDrive on the global navigation bar

2. SharePoint will display your **OneDrive** page

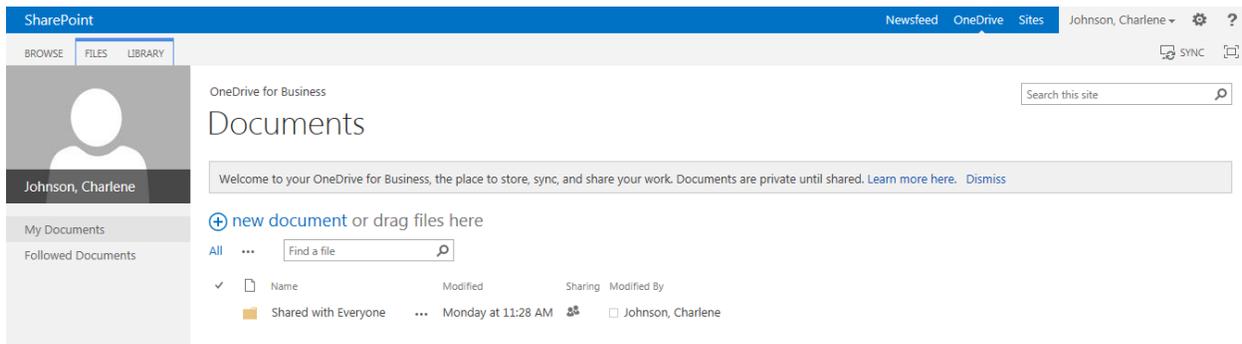


Figure 9 OneDrive library when you select OneDrive on the global navigation bar

4.3 Sites

Selecting **Sites** on the global navigation bar located at the top right corner of the page, will allow you to quickly navigate to sites you are following. The primary benefit is that this is customizable and will be a time saver when navigating from one site to another.

For more information on navigation between sites, please see the section on 'Follow Sites and Documents' in a later section of this document.

Apply Your Knowledge: Exercises

Complete **Exercise 4: Global Navigation** in your [SharePoint Basic Concepts: Exercises](#) manual.

5.0 Sorts and Filters

5.1 Sorts

You can sort a list. The sort will display the list in ascending or descending order.

To sort a list,

1. Navigate to the library or list, e.g. SP Training Documents
2. SharePoint will display the items in the list

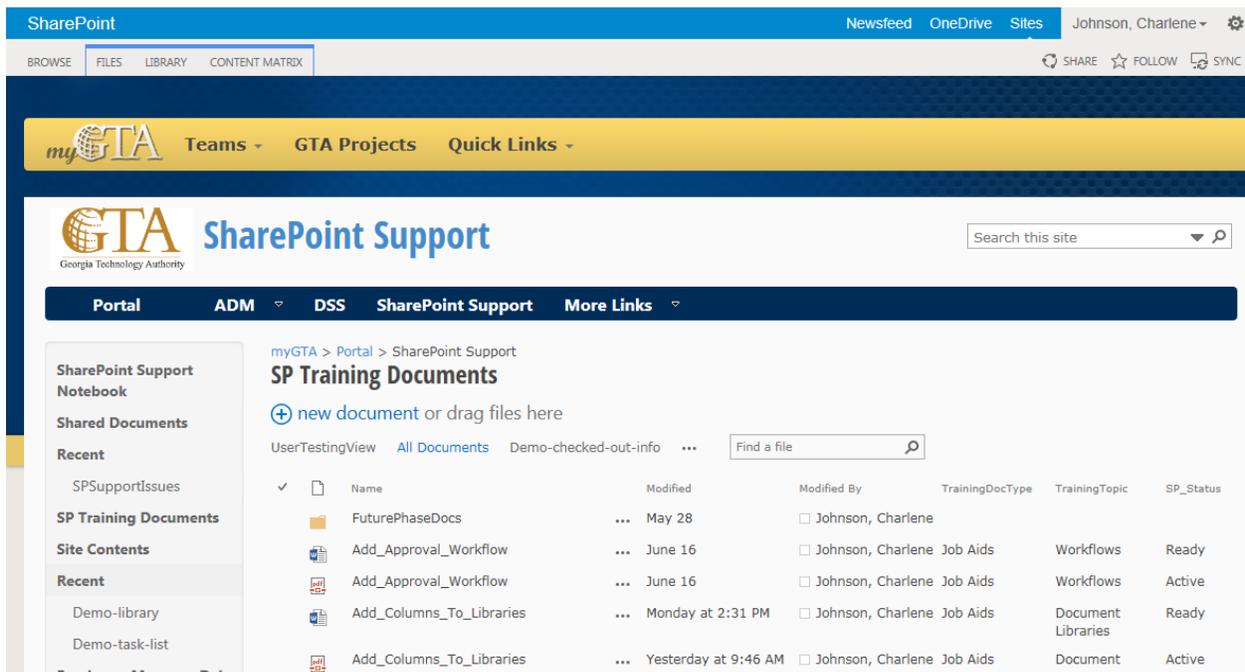


Figure 10 List when selecting a document library

3. Hover over the title of the column you want to sort and click the arrow icon, or **Open menu** icon that appears.

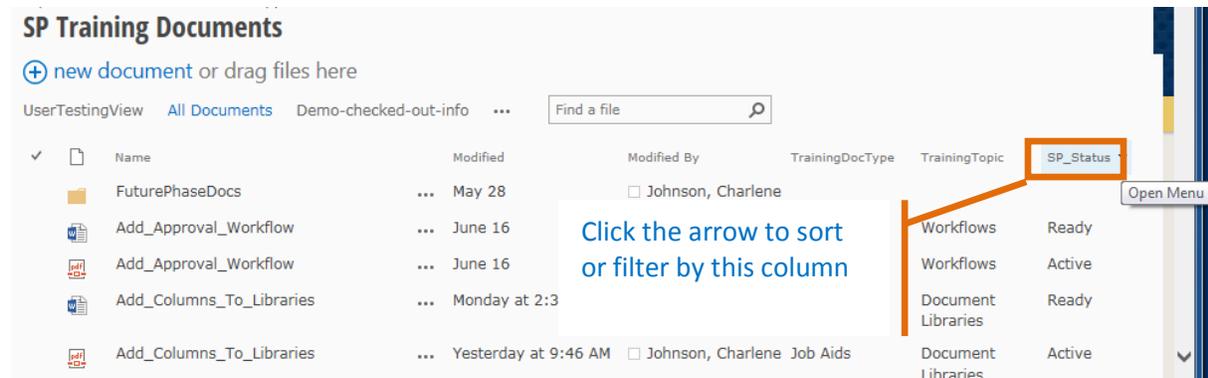


Figure 11 Open Menu when hovering over a column

- SharePoint will display the sort options and valid values

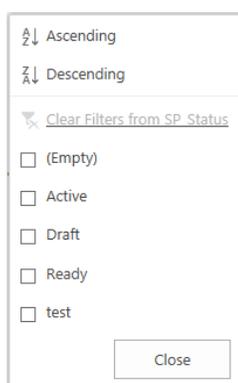


Figure 12 Sort and filter items for a list

- Click on **Ascending** or **Descending**
- SharePoint will sort the list

5.2 Filters

Filters will allow you to limit the display to only those items that meet your specifications. For example, you can filter a list by the status of 'pending' and the display will only show those items that are marked 'pending.'

When using filters, you can select more than one filter at a time.

Note: You can also use a filter on the documents in a document library. Follow the same process as using a filter on a list.

To filter a list,

- Navigate to the library or list, e.g. SP Training Documents
- SharePoint will display the items in the list

3. Hover over the title of the column you want to sort and click the arrow icon, or Open menu icon that appears.

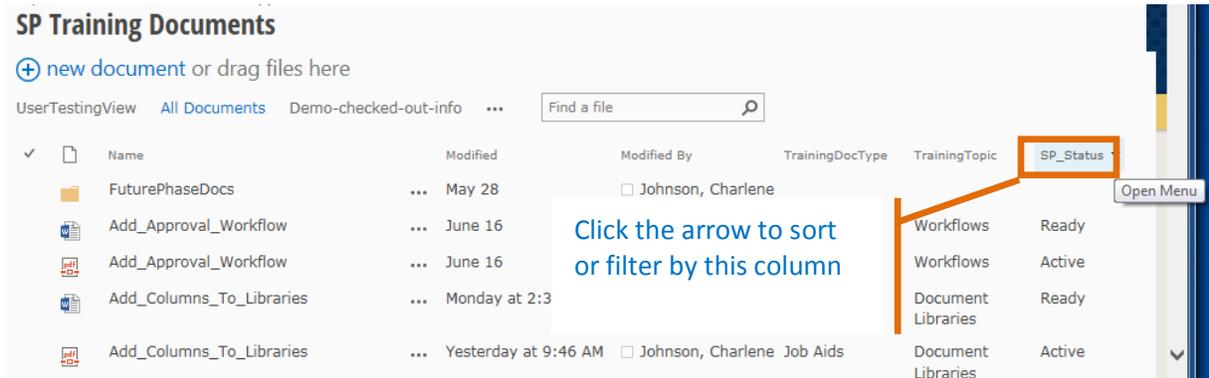


Figure 13 Open Menu when hovering over a column

4. SharePoint will display the sort options and valid filter values

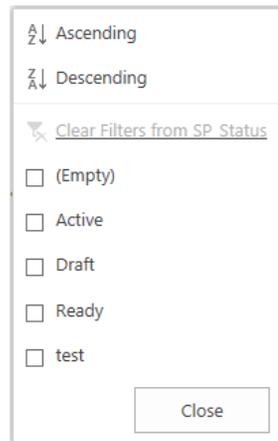


Figure 14 Sort and Filter values when you display this list

5. Click the check box on one or more values you want to use as a filter, and click **Close**.
6. SharePoint will display the filtered list of only those values you selected

Apply Your Knowledge: Exercises

Complete **Exercise 5: Sorts and Filers** in your [SharePoint Basic Concepts: Exercises](#) manual.

6.0 Work with Searches

6.1 Global Search

The global search is also called the site search. A global search will search across the entire SharePoint site and then display the results.

The following global searches are available:

- Everything
- People
- Conversations
- This Site

Note: For the best search results, always use meaningful names for all titles.

Also, it may take up to 24 hours turnaround time for an item to become available to the search. As SharePoint stabilizes, it is expected that the search turnaround time will be greatly reduced.

To use a global search,

1. Click on the down arrow in the **Search this site** box and select the search type, e.g. **This Site**

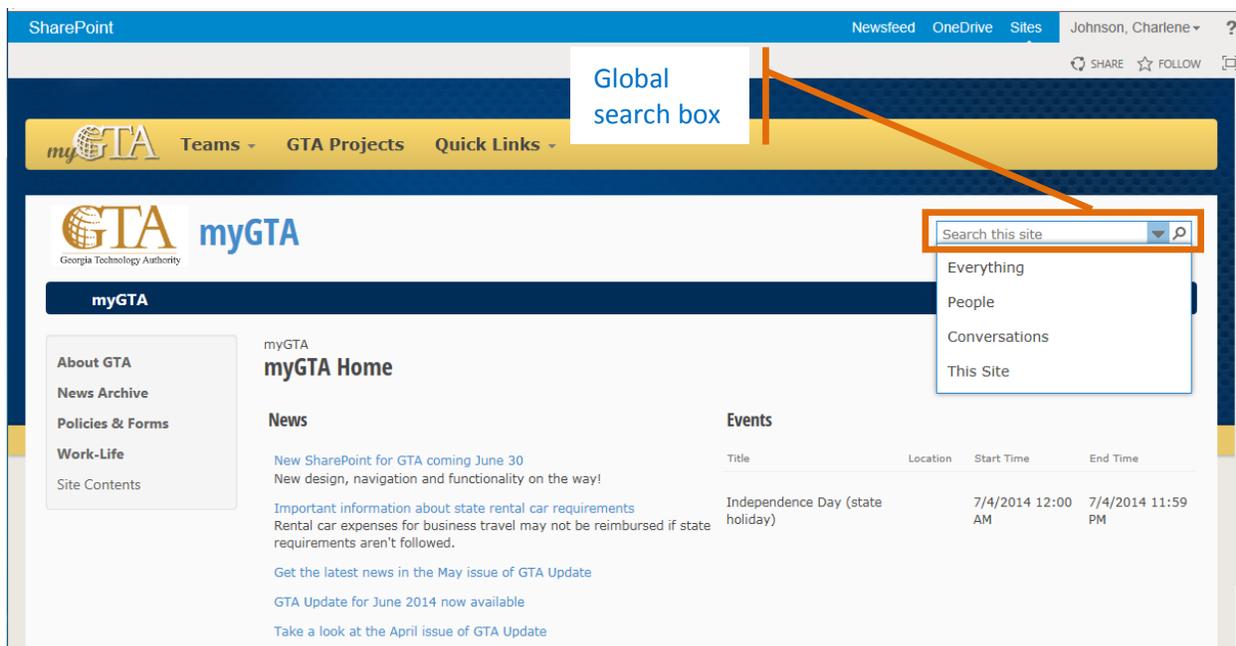


Figure 15 Search box when selecting a global search

2. Enter the search criteria
3. Click the magnifying glass next to the item search box or press the **Enter** key to perform the search

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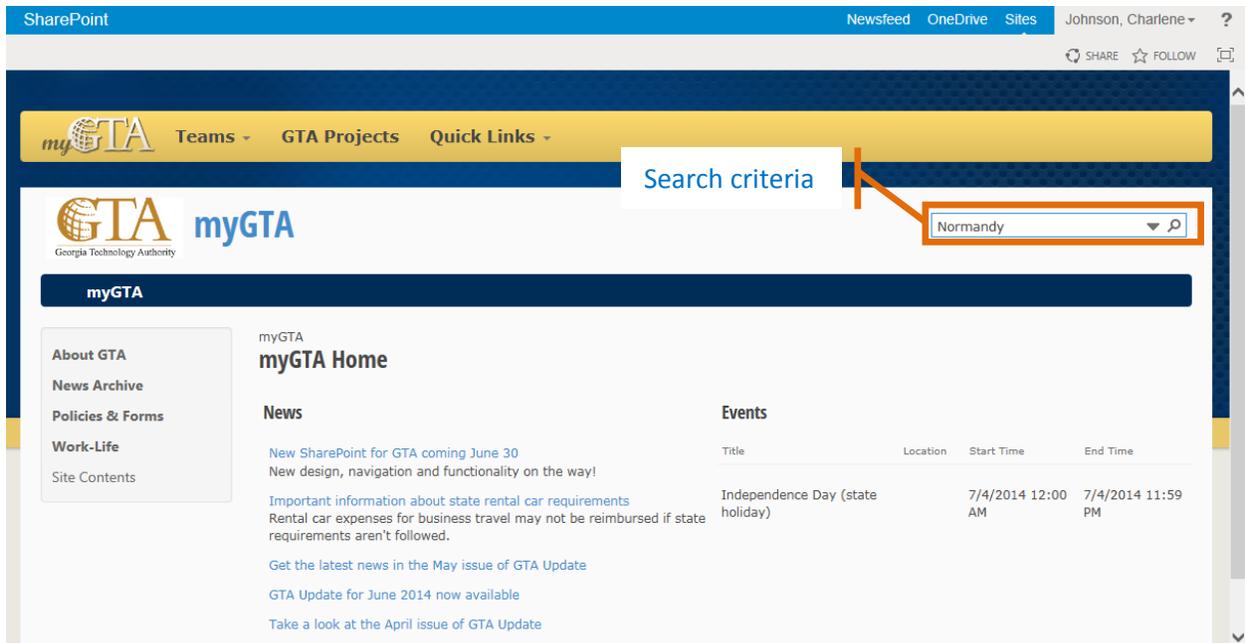


Figure 16 Global Search Box when entering search criteria

4. SharePoint will search the site and display the search results

6.2 Item Search

The item level search is used to search a specific library or a list. This search is limited to the specified library or list and will not search entire site. For example, you might want to search for a file in a specific document library.

To use an item level search,

1. Select an item on the Quick Launch, e.g. select SP Training Documents library
2. Enter the search criteria in the item search box
3. Click the magnifying glass next to the item search box or press the **Enter** key to perform the search

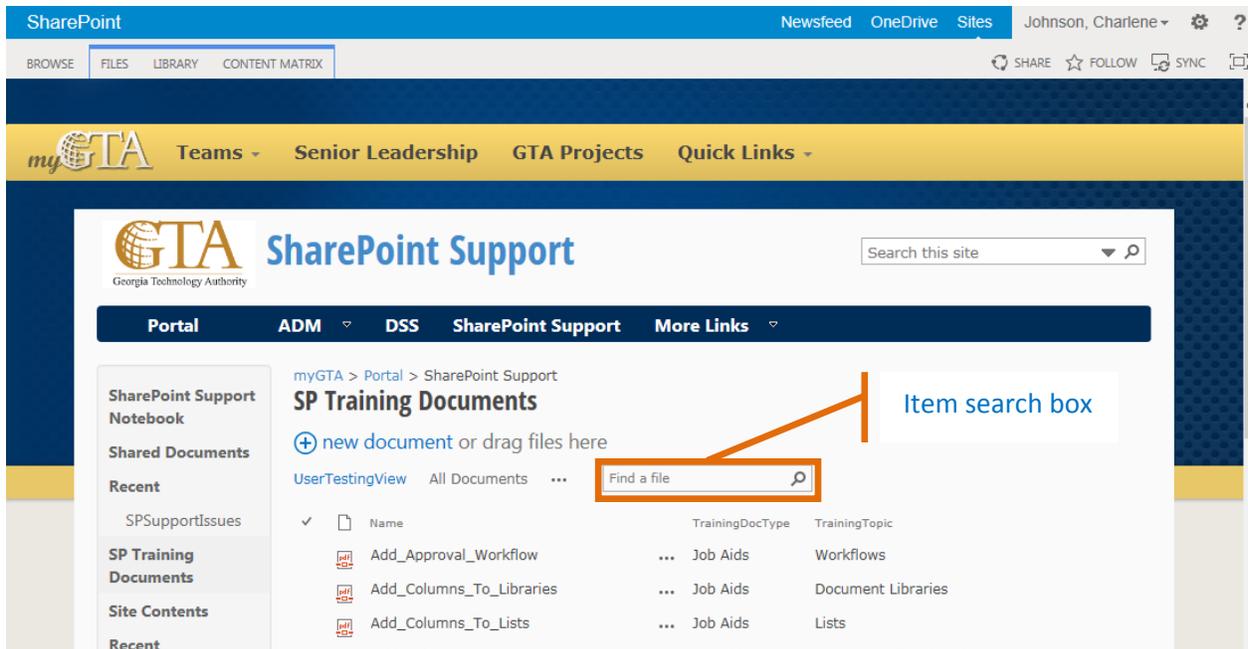


Figure 17 Search box when selecting an item search

4. SharePoint will display the search results

Apply Your Knowledge: Exercises

Complete **Exercise 6: Work with Searches** in your [SharePoint Basic Concepts: Exercises](#) manual.

7.0 View and Edit Documents

A document library is a container for documents. Depending on your permissions, documents can be opened, edited, shared or followed. You will notice that there tends to be more than one way to perform most SharePoint functions. In particular, there are several ways to add documents to a document library.

Note: SharePoint uses different terminology for the same functionality, e.g. the view function for a pdf will be 'Open' and the view option for a Word document will be 'View.'

7.1 View Documents

To view a document,

1. Select a library (in this example, we selected the **SP Training Documents** library from Quick Launch on the left)
2. Select an item from the list by clicking on it

3. SharePoint will display the document

Note: To view a document, you can also click on the ellipses next to the name of the document and then click **Open**.

7.2 Check out Documents for Editing

Team collaboration is an important function. However, a problem can arise when two or more users attempt to make changes to the same document at the same time. To avoid this problem, you will check out a document before you start making edits. This will assign you exclusive rights to edit the document. When the document is checked out other users can view the document, but they cannot make changes to the document.

Note: Changes you make to the document will not be seen until you check the document back in. Also, no one else can make changes to the document until you check in the document.

To check out a document for editing,

1. Identify your document
2. Click the ellipses  associated with your document
3. SharePoint will display a pop up menu

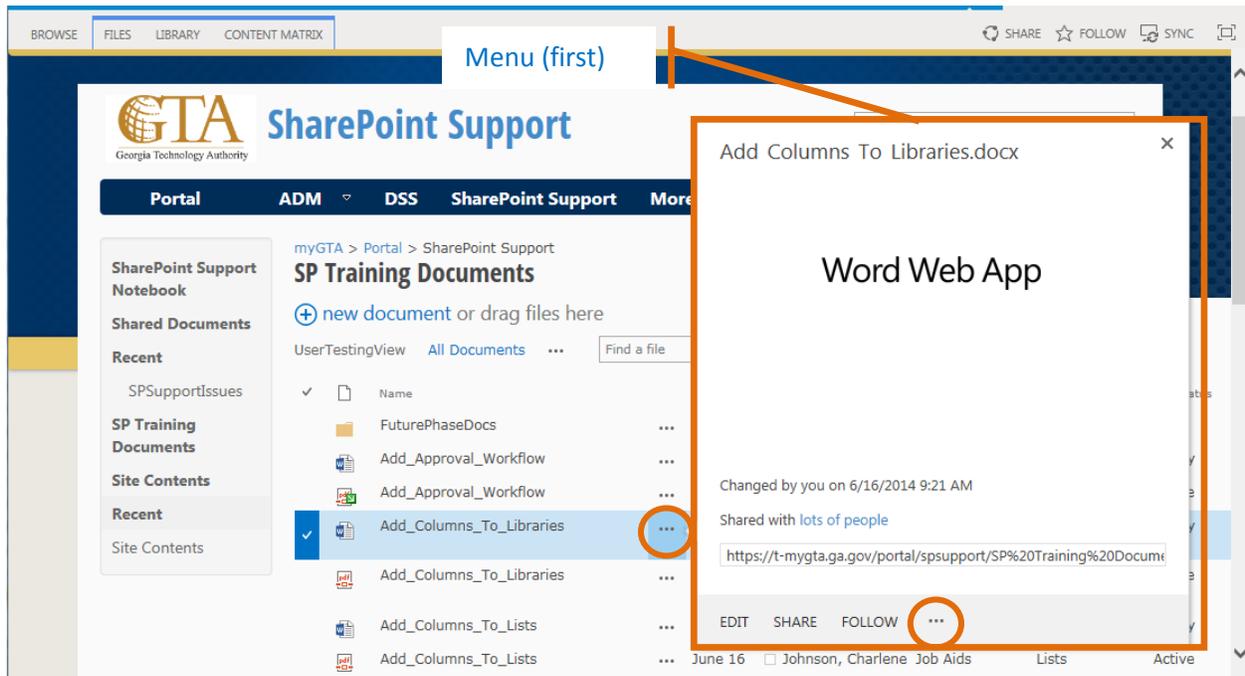


Figure 18 Menu when clicking on ellipses from a list

4. Click the ellipses  on the pop up menu
5. SharePoint will display a drop down
6. Select **Check out** from the drop down

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7. SharePoint will record that the document is checked out to you

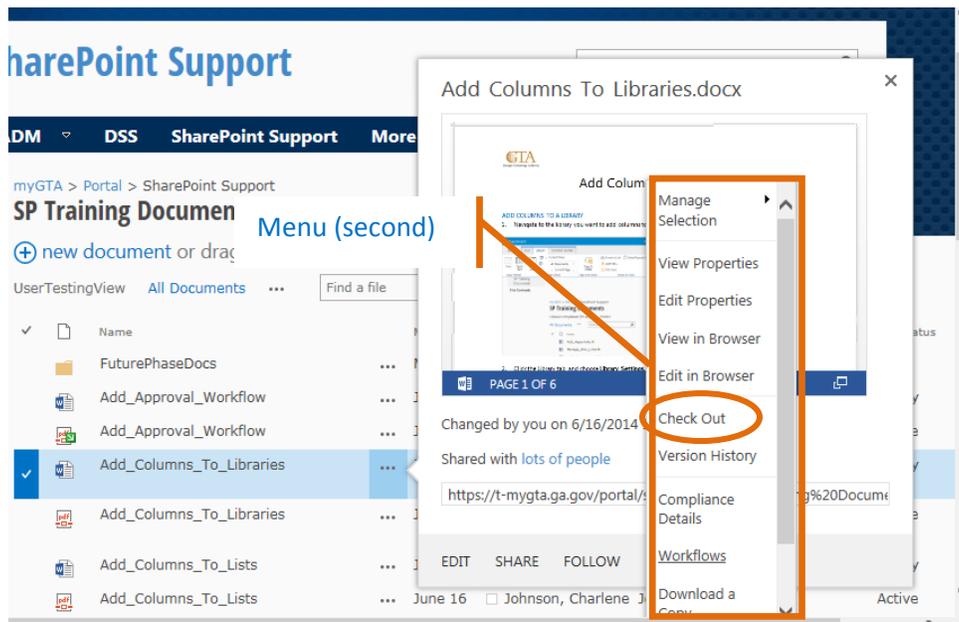


Figure 19 Menu when clicking on ellipses from the pop up menu

8. Select **Edit** from the menu

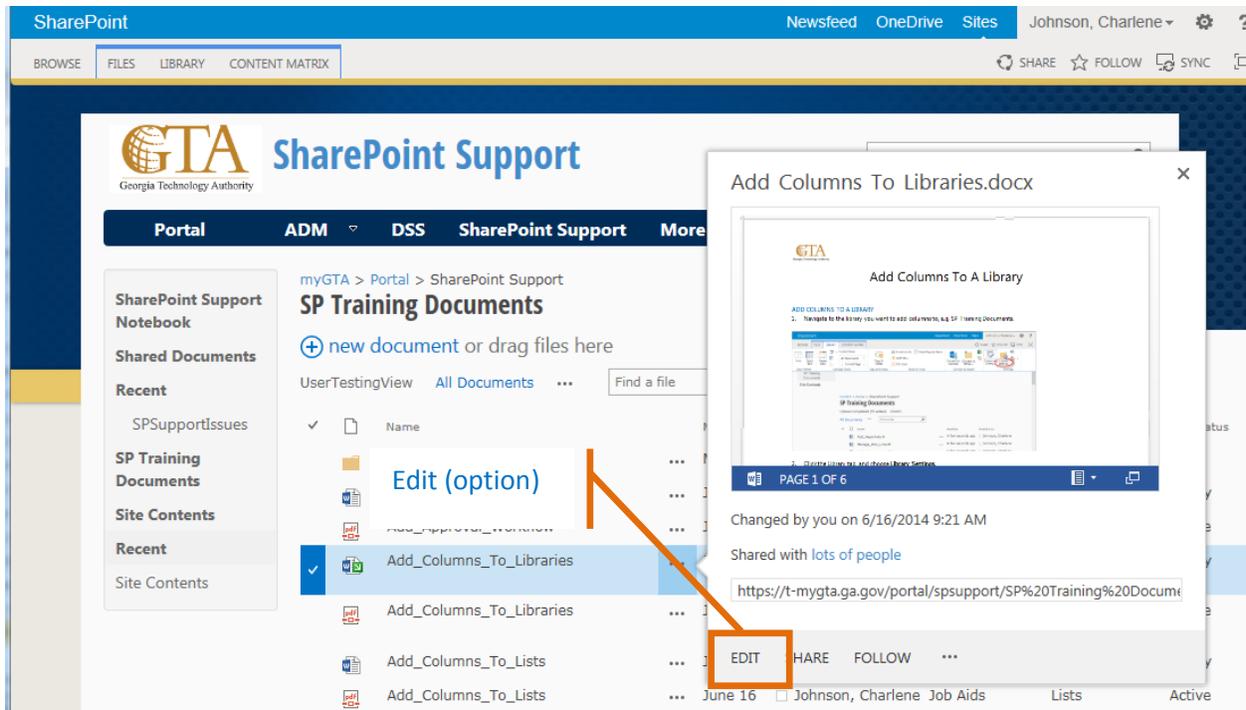


Figure 20 Edit option when displaying the edit menu

- SharePoint will open the document and you can edit it

Note: If you open the document using EDIT, the document will open in Word, Excel, etc.

You can open the document in the browser using the web version of Word, Excel, etc. by clicking on the ellipses **...** and then clicking **Edit in Browser** from the drop down.

7.3 Check in Documents after Editing

When you are finished editing the document, you will check in the document. When the document is checked in other users can view the changes. Also, when a document is checked in, it will become available for editing.

To check in a document after you are finished editing it,

- When you are finished making changes to the document, click **Exit**

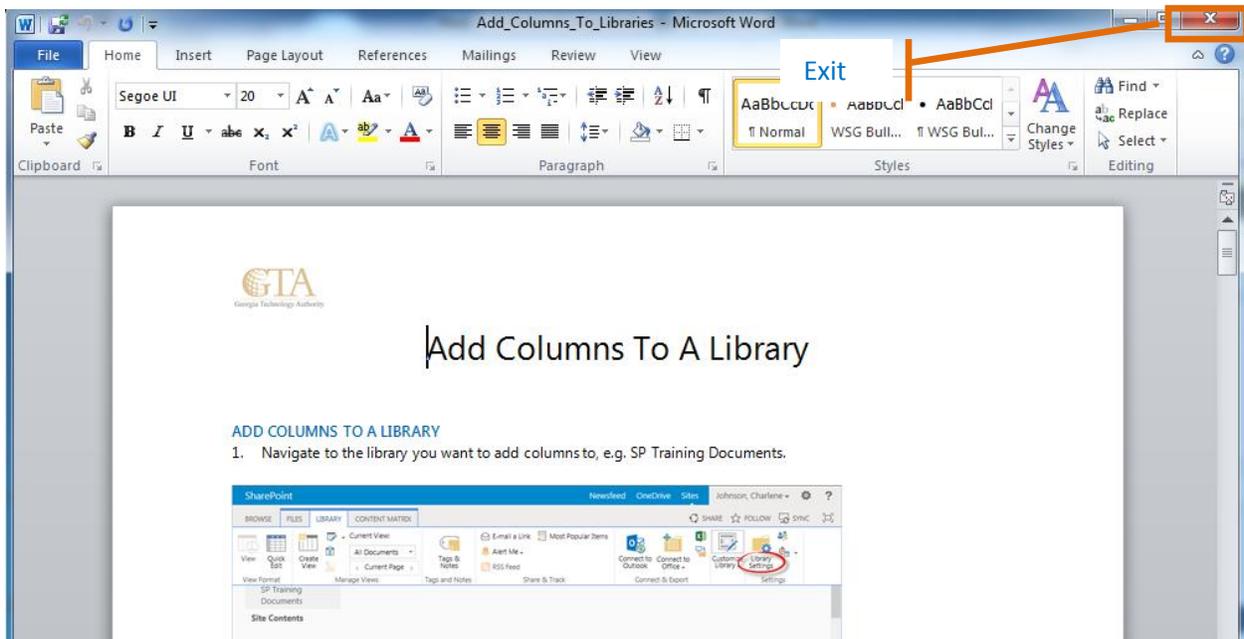


Figure 21 Exit when you are finished editing

- When prompted, click **Save**

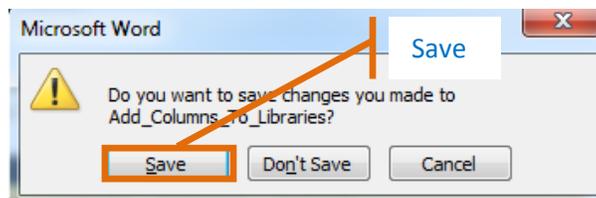


Figure 22 Save when you are finished editing

3. When prompted, confirm that you want to check in the document by clicking **Yes**

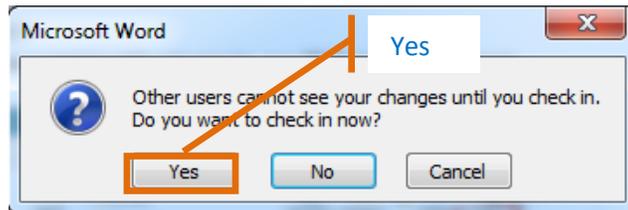


Figure 23 Yes when confirming you want to check in the document

4. When prompted, add comments about the changes you made and click OK

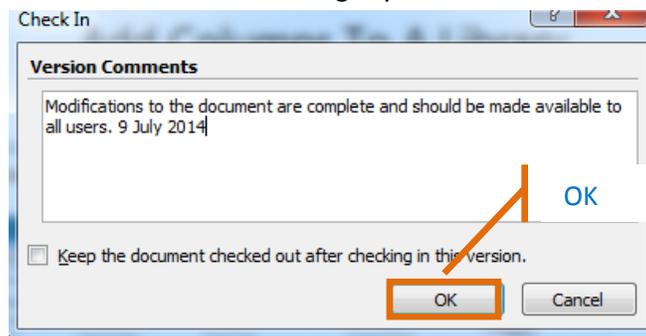


Figure 24 OK after you enter version comments

5. SharePoint will save your comments and make the changes to the document available to other users

Apply Your Knowledge: Exercises

Complete **Exercise 7: View and Edit Documents** in your [SharePoint Basic Concepts: Exercises](#) manual.

8.0 Work with Document Properties

Document properties are used to catalog documents and include information such as the name of the document, the version number, who created the document and when it was last updated, etc. You may also hear this document's properties referred to as metadata.

SharePoint search functionality uses document properties to find information as quickly and easily as possible. You can improve the efficiency of the search functionality by making sure that document properties are as complete as possible. You can also increase the efficiency of the search by using key words to make titles as meaningful as possible, and by creating and following naming conventions for your documents.

You can **view** document properties or **edit** them.

8.1 View Document Properties

To **view** document properties,

1. Identify a document whose properties you want to view
2. Click the ellipses **...** associated with your document
3. SharePoint will display a pop up menu

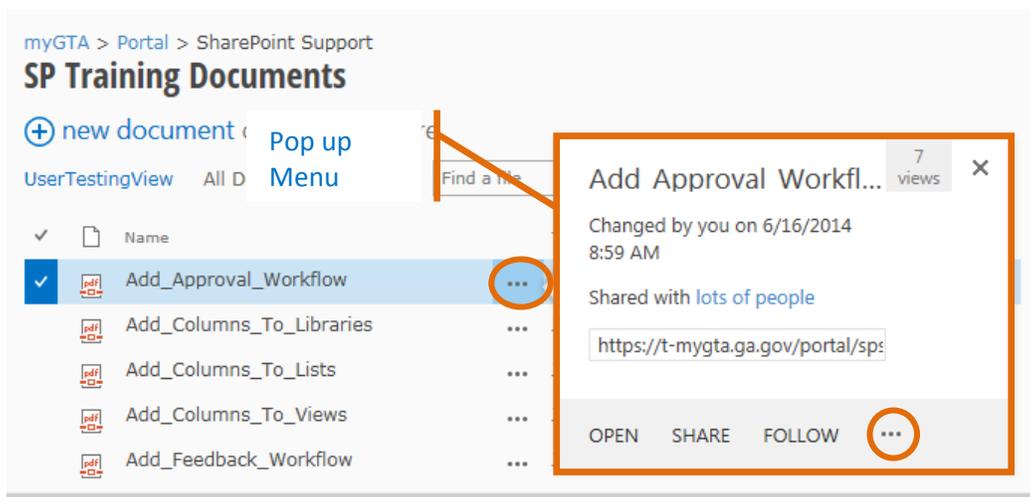


Figure 25 Pop up menu when clicking on ellipses

4. Click the ellipses **...** on the pop up menu
5. SharePoint will display a drop down

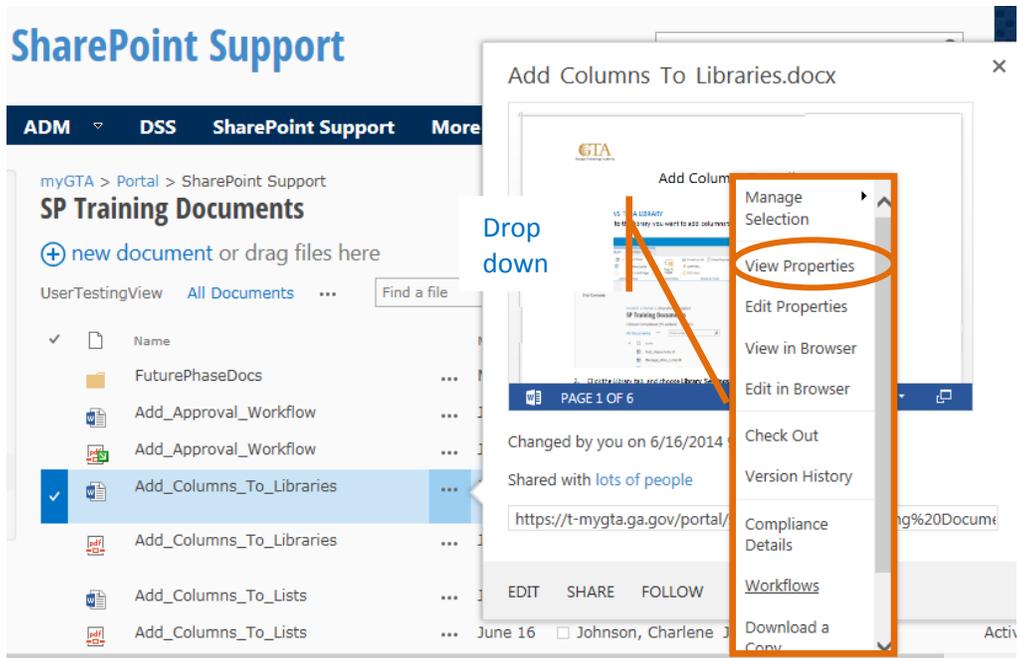


Figure 26 Drop down when clicking on ellipses from the pop up menu

6. Select **View Properties** from the drop down
7. SharePoint will display the properties of the document

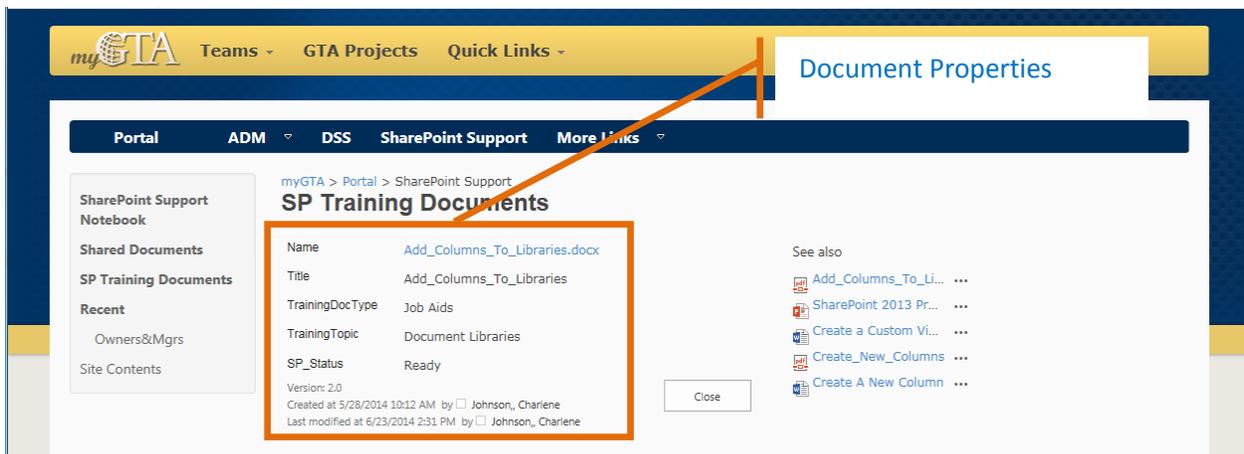


Figure 27 Document Properties when clicking on View Properties

8.2 Edit Document Properties

Document properties include Name, Title and other fields. You can change these fields by editing the document properties. You can even rename a document by changing the document properties.

Note: If you change the document **Name**, it will change the URL for the file, i.e. changing the **Name** of a file is like moving the file location.

If you change the document **Title**, the URL of the file does not change.

To edit document properties,

1. Identify a document whose properties you want to view
2. Click the ellipses **...** associated with your document
3. SharePoint will display a pop up menu

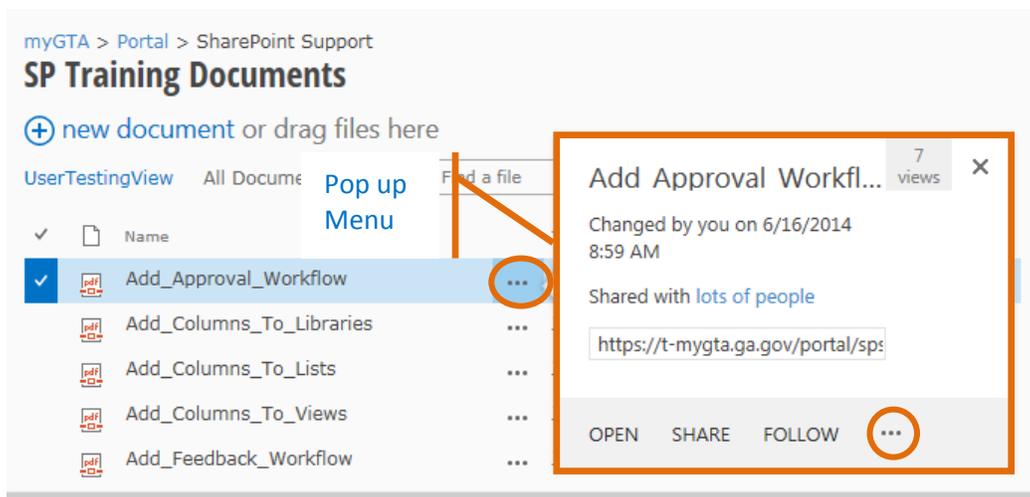


Figure 28 Menu when clicking on ellipses

4. Click the ellipses **...** on the pop up menu
5. SharePoint will display a drop down

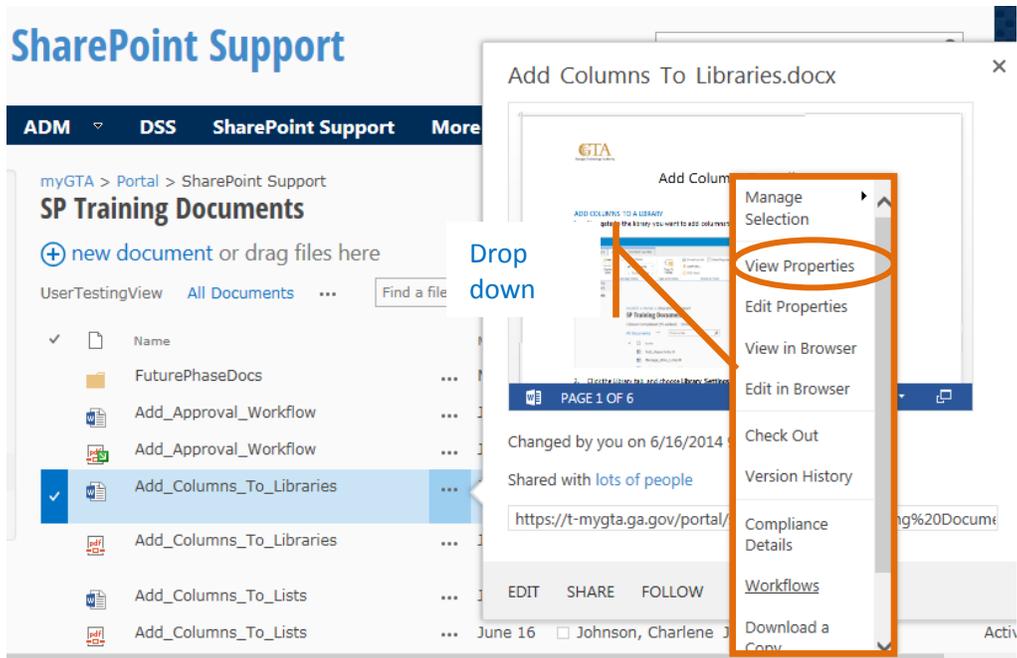


Figure 29 Menu when clicking on ellipses from the Edit menu

6. Select **Edit Properties** from the drop down
7. SharePoint will display the properties of the document and you can edit them
8. Click **Save** to save your changes

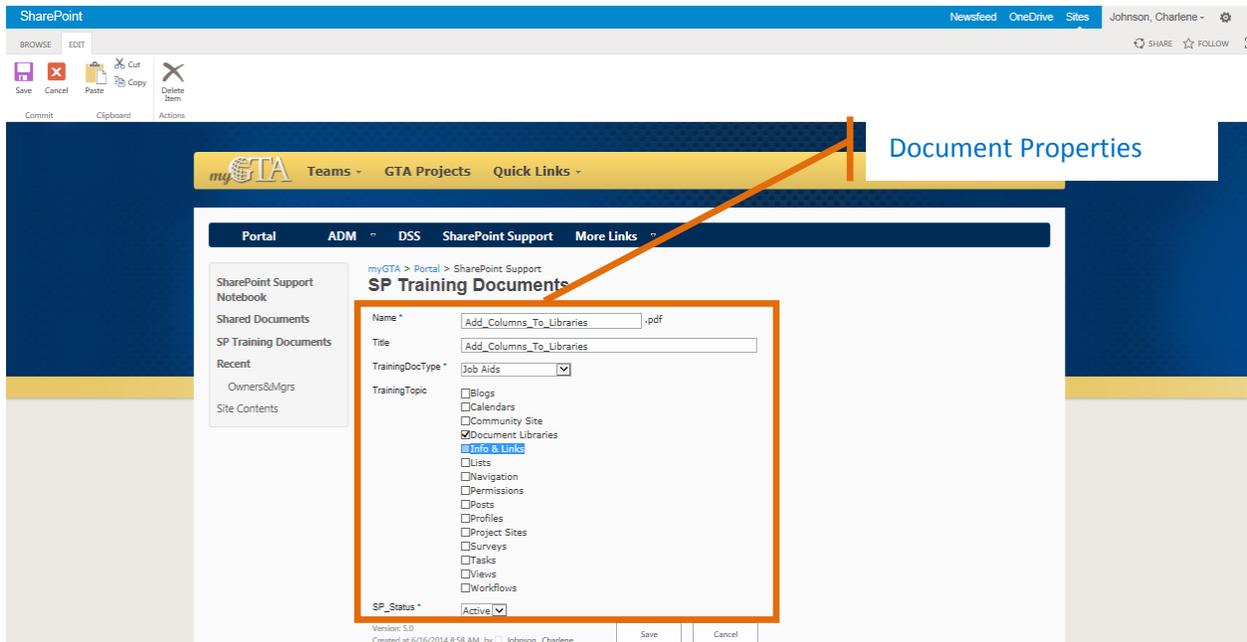


Figure 30 Document properties when clicking on Edit Properties

Apply Your Knowledge: Exercises

Complete **Exercise 8: Work with Document Properties** in your [SharePoint Basic Concepts: Exercises](#) manual.

9.0 Follow Sites

Following a site, will allow you to see that site's Newsfeed. So when a post is made on the site's Newsfeed, you'll see it in your Newsfeed.

If your team has its own SharePoint site, everyone on your team should follow the site. This will allow you to quickly communicate with one another and not have to search endless email chains to recall the conversation. You can even announce important information by posting it on the site's Newsfeed and then everyone who is following the site will receive the notification.

Following a site also helps you quickly get back to the site with just a few clicks. This will be a time saver when you are navigating throughout the site.

9.1 Follow Sites

To follow a site,

1. Identify a site you want to follow
2. Click **FOLLOW** at the top of the page

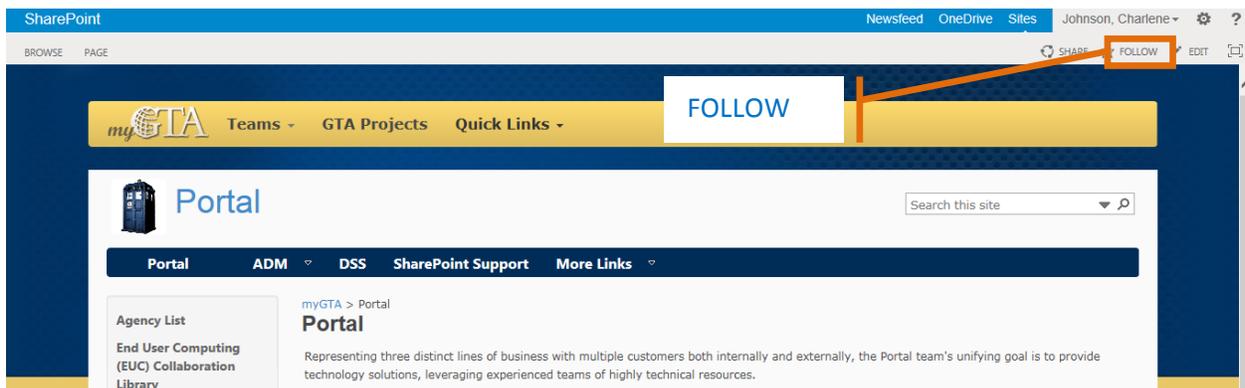


Figure 31 FOLLOW on the top of the site page

3. SharePoint will display a message that you are following the site. You can check your Newsfeeds for updates

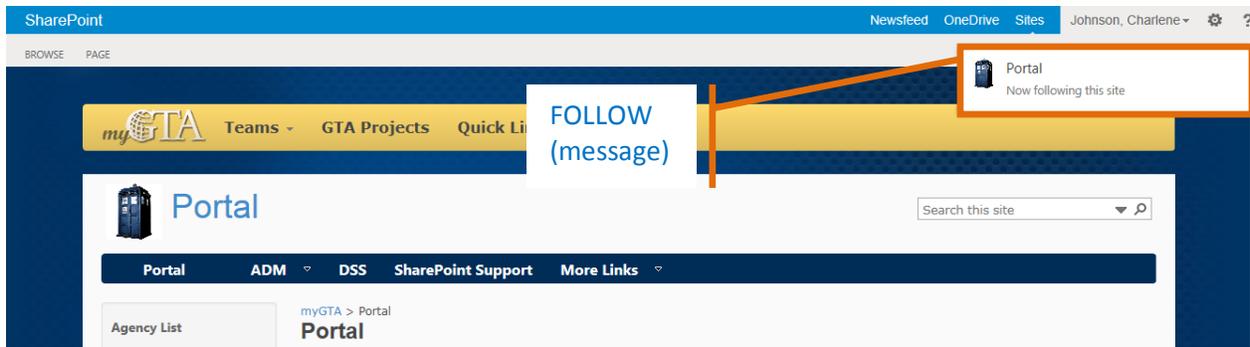


Figure 32 FOLLOW message when you follow a site

9.2 Navigate to Sites you are following

1. Click **Sites** from the global navigation bar

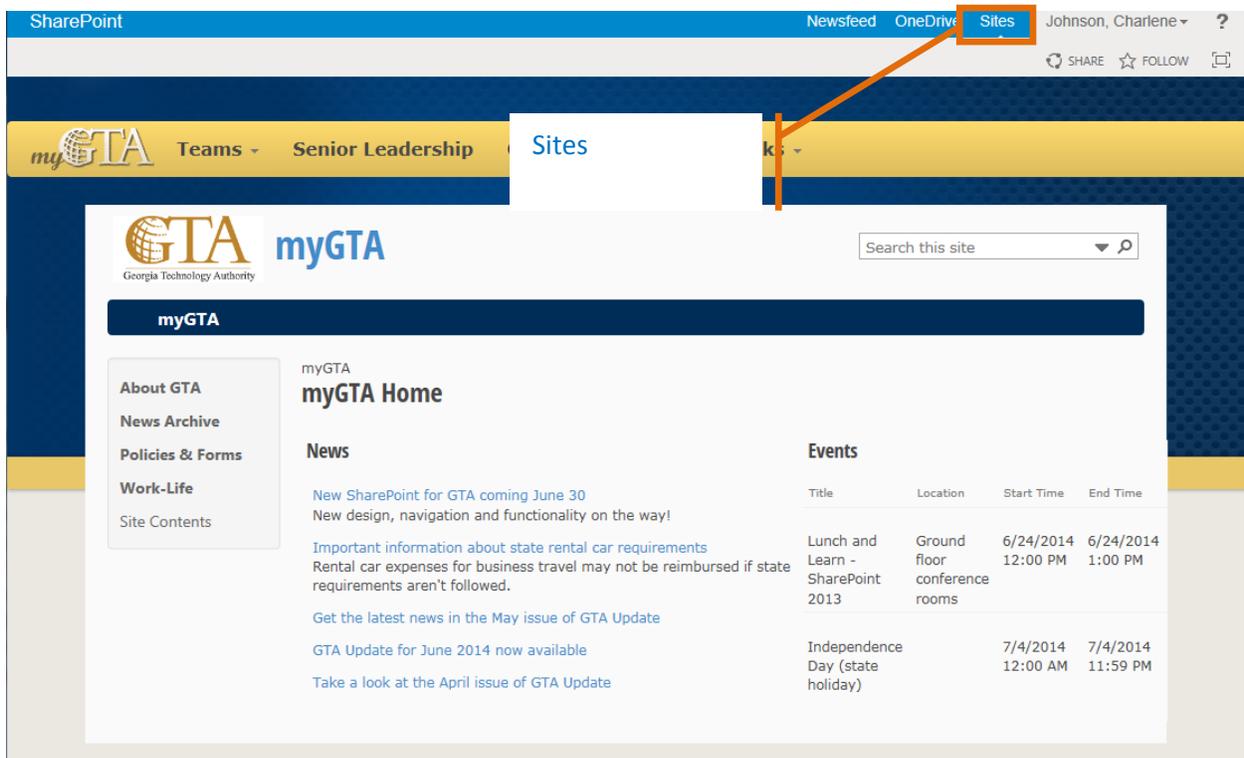


Figure 33 Sites on the global navigation bar

2. SharePoint will display the sites you follow

3. Click the title of the site you want to navigate to, e.g. Portal and SharePoint will display the landing page for the selected site

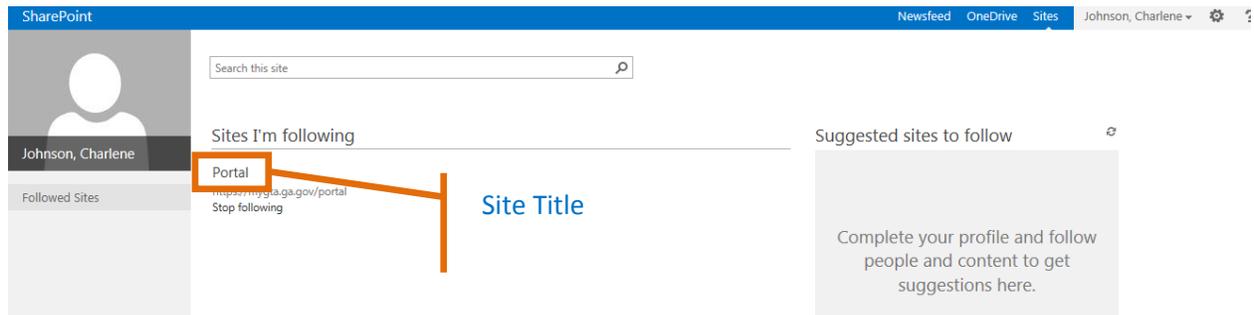


Figure 34 Site Title when you follow the site

9.3 Post to a Site

When you post to a site, everyone who is following the site will receive an update in their newsfeed. SharePoint will send simultaneous notification of announcements and other news updates that are in the site newsfeed. This will allow everyone on the team to stay current with news events.

To post to a site,

1. Identify a site you want to post to
2. Enter your post in the **Newsfeed** section
3. Then click **Post**

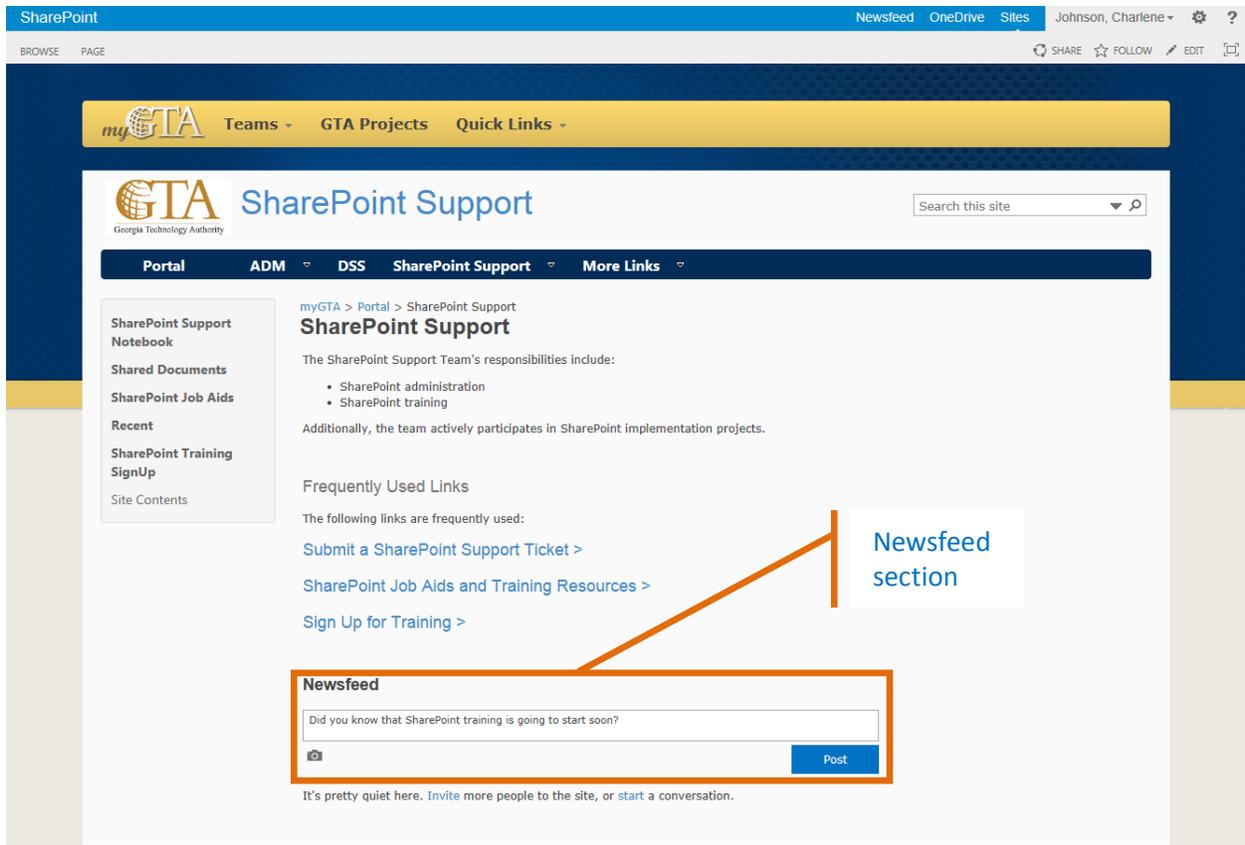


Figure 35 Newsfeed section when you want to post to a site

4. SharePoint will display your post and update the **Newsfeed** of everyone who is following the site.

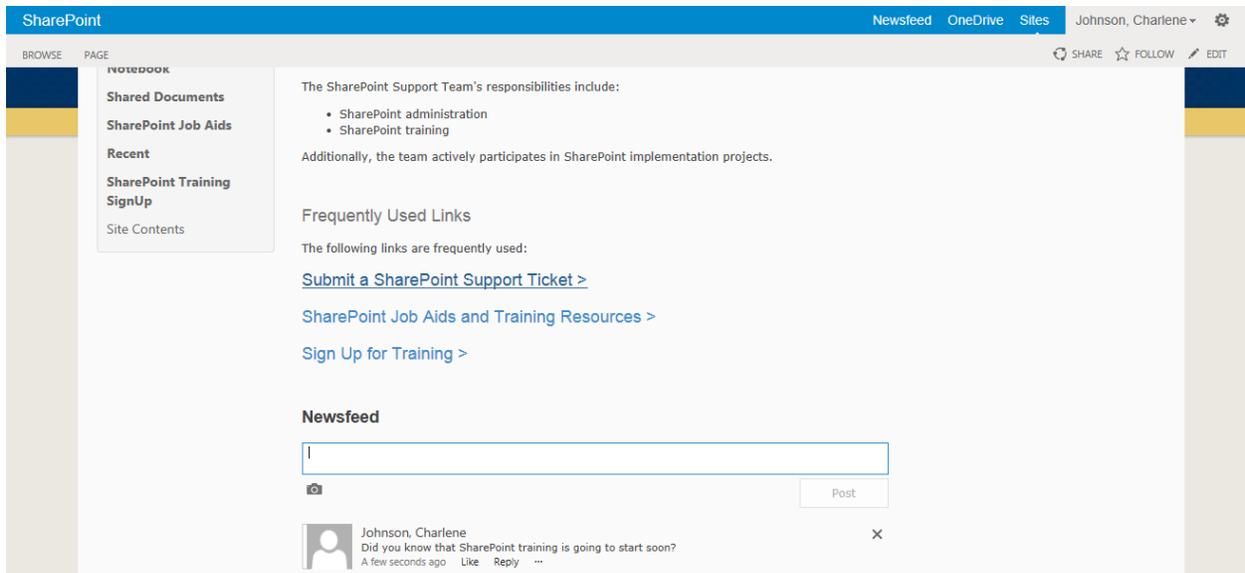


Figure 36 Post message when you post to a site

9.4 Check Newsfeed Site Updates

You can check your newsfeeds to see posts to sites you are following.

To check your newsfeeds,

1. Click **Newsfeed** from the global navigation bar



Figure 37 Newsfeed tab when you want to select it on the global navigation bar

2. SharePoint will display the newsfeed posts for the sites you are following
3. SharePoint will display the posts to the site

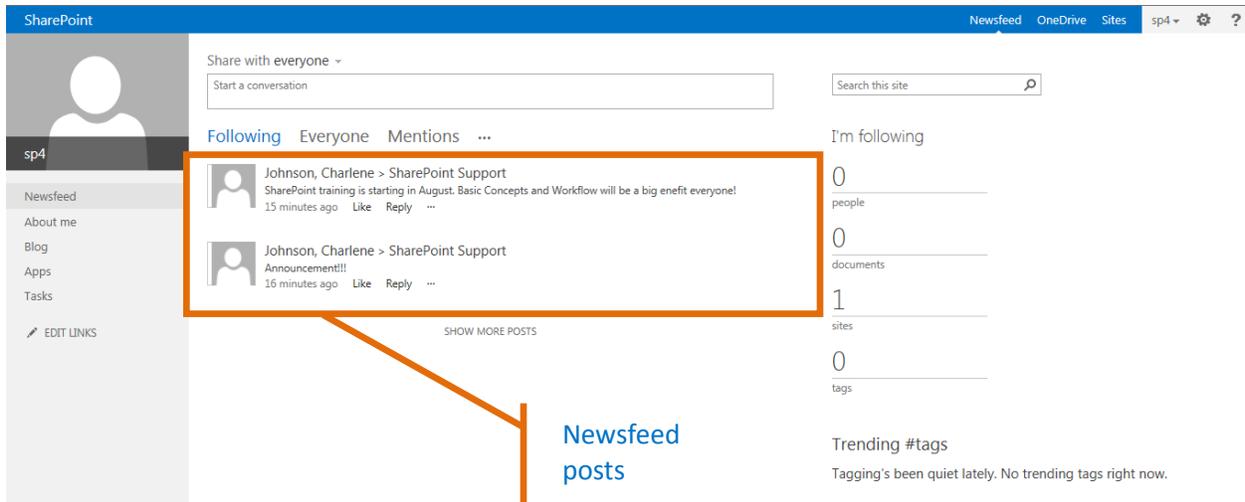


Figure 38 Posts displayed in your newsfeed when you follow a site

Apply Your Knowledge: Exercises

Complete **Exercise 9: Follow Sites** in your [SharePoint Basic Concepts: Exercises](#) manual.

10.0 Follow Documents

As part of the team collaboration, you may want to follow a document. Following a document will allow you to receive a newsfeed when a document is changed.

10.1 Follow Documents

When you follow a document, your newsfeed will be updated whenever changes to the document are saved. This will prevent you from having to constantly ask your team members if they finished making changes to the document.

Note: You can follow individual documents, but you *cannot*, follow an entire document library.

If you want to know when a change is made to a document in a library, you will need to create an alert which is one of the ribbon functions. You must have sufficient permission to use ribbon functions.

To follow a document,

1. Identify a document you want to follow
2. Click the ellipses  associated with your document
3. SharePoint will display a menu
4. Select **FOLLOW** from the menu

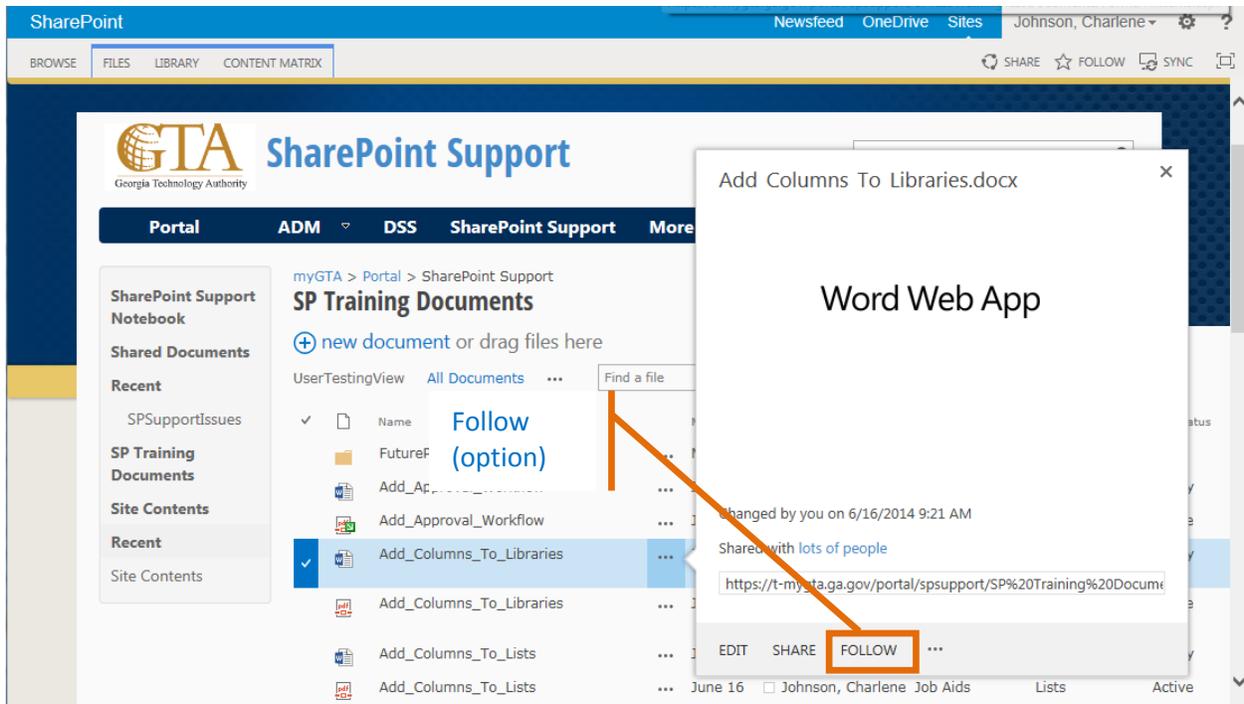


Figure 39 FOLLOW option on the Edit Menu

5. SharePoint will send a notification to your newsfeed whenever changes to the document are saved.

10.2 Check Newsfeed Document Updates

You can check your newsfeed to see when changes to a document you are following have been saved.

To check your newsfeeds,

1. Click **Newsfeed** from the global navigation bar



Figure 40 Newsfeed tab when you want to select it on the global navigation bar

2. SharePoint will display newsfeeds when changes to the document you are following have been saved

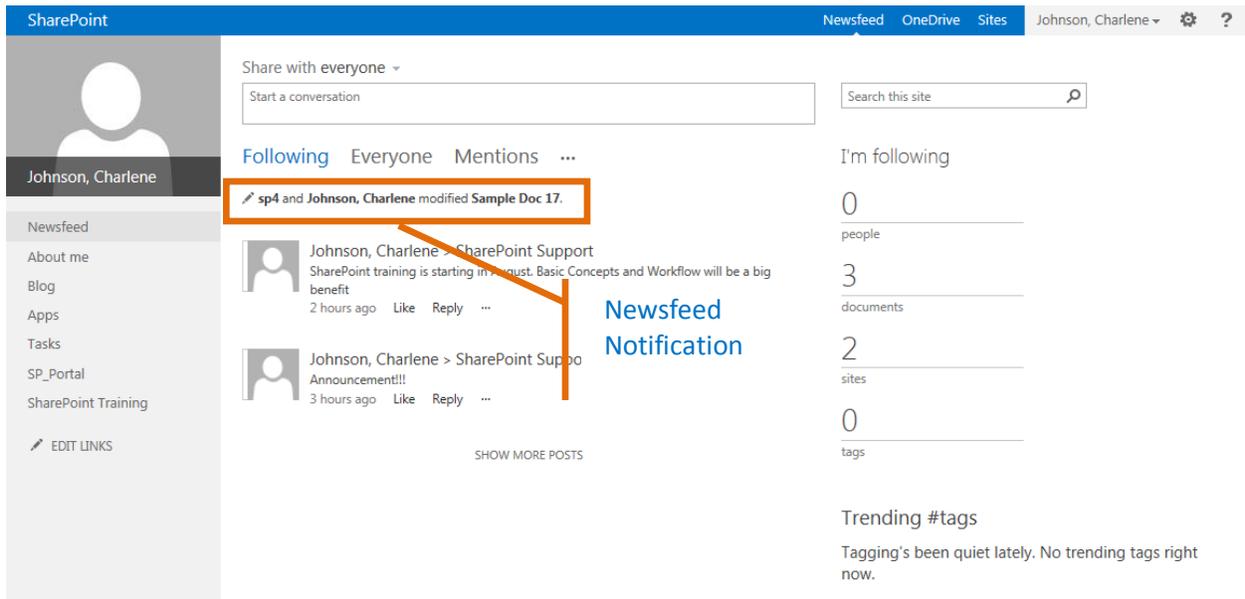


Figure 41 Newsfeed notification displayed when a document you followed was changed

10.3 Stop Following Documents

When you stop following a document, you will no longer receive newsfeed updates when the document is changed.

To stop following a document,

1. Click **Newsfeed** from the global navigation bar
2. Click the number of **Documents** you are following

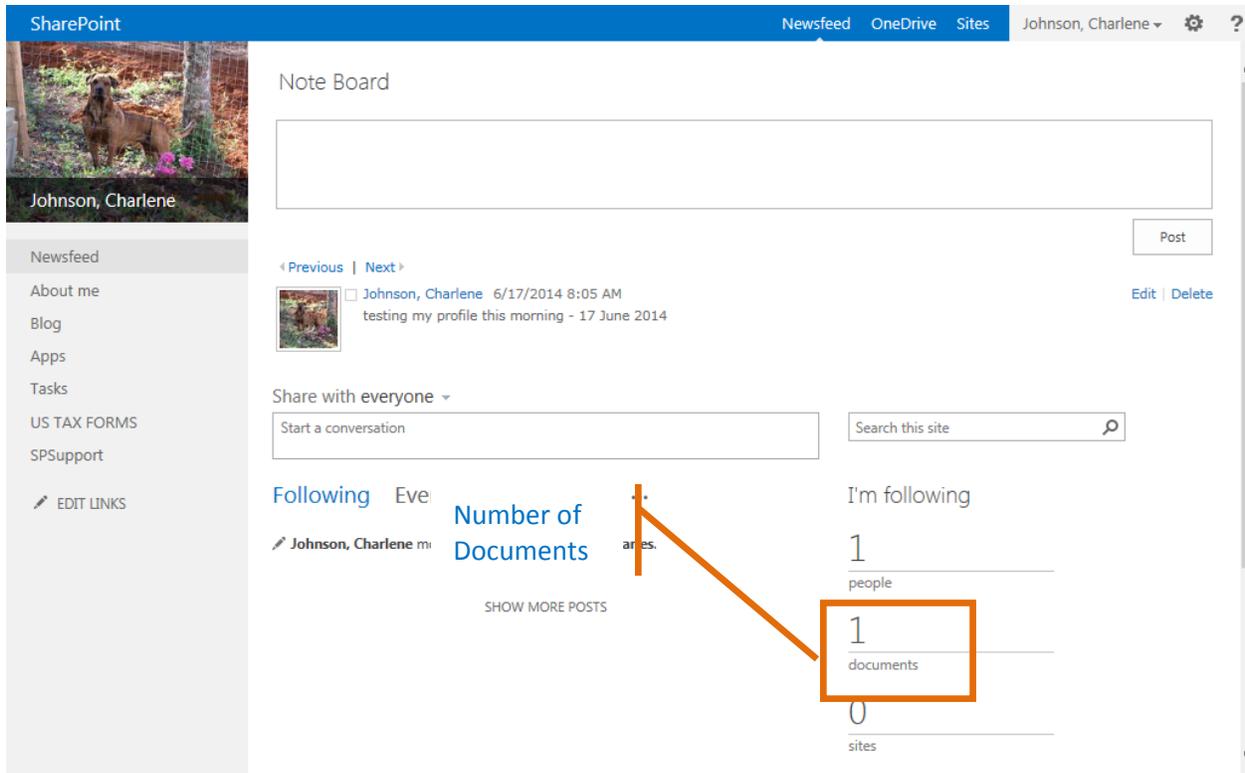


Figure 42 Number of Documents you follow when you are on the Newsfeed page

3. SharePoint will display **Docs I'm following**
4. Click **Stop following** under the document you want to stop following

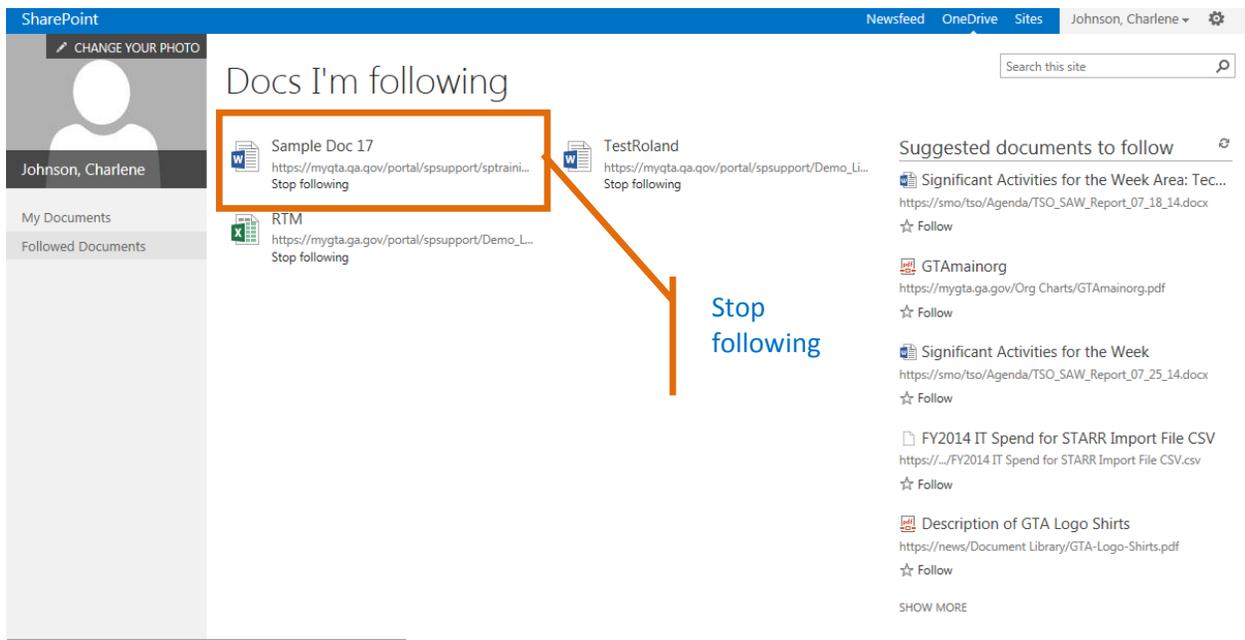


Figure 43 Stop following option on the Docs I'm following page

Apply Your Knowledge: Exercises

Complete **Exercise 10: Follow Documents** in your [SharePoint Basic Concepts: Exercises](#) manual.

11.0 Add Library Documents

This section will discuss various ways to add documents to libraries. You may also hear documents referred to as *items*.

11.1 Drag New Documents

You can populate a library by dragging and dropping new documents.

Note: You must have permission to add content to a library.

To drag new documents to a library,

1. Select the library to which you want to add content. Organize your computer screen so that you can also see the folder that contains the documents you want to add to the library (see figure below).

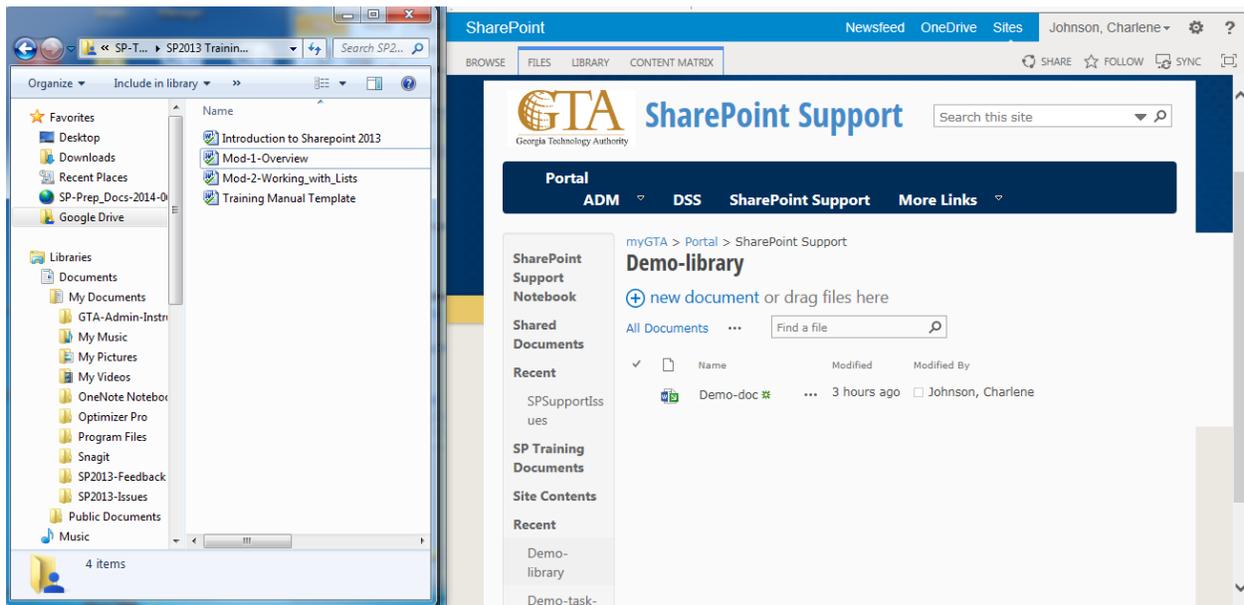


Figure 44 Personal documents and document library

2. From the folder, click on the items you want to add and drag them to the **drag files here** area

Revised 03/03/2014

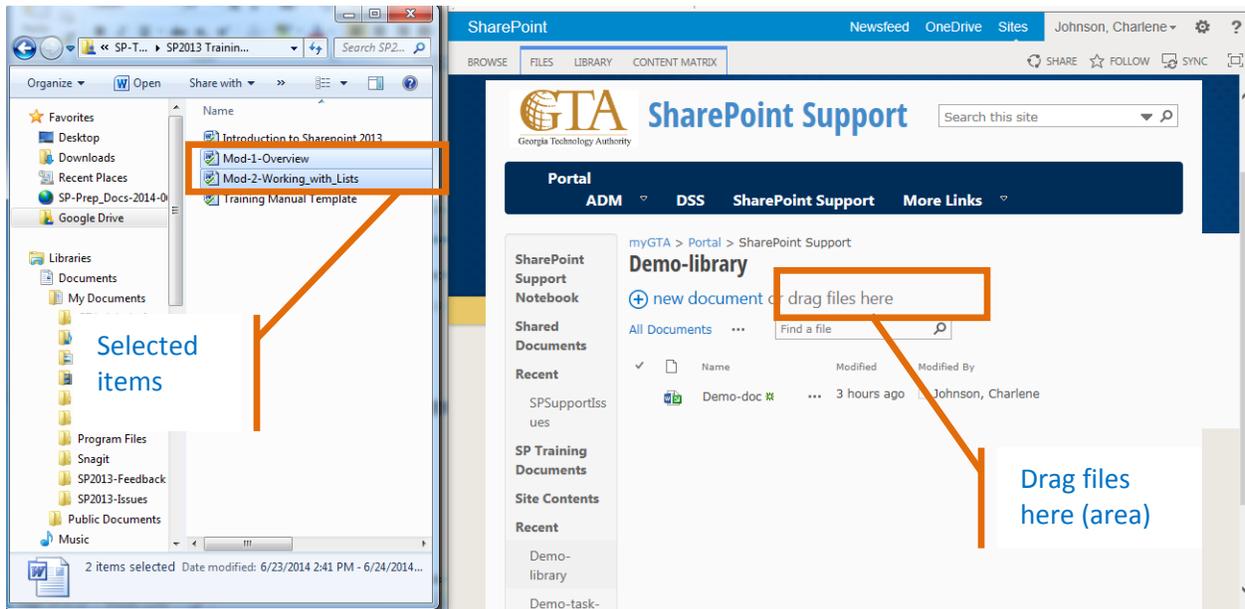


Figure 45 Selecting documents that will be dragged to SharePoint

3. SharePoint will gray out the **drag files here** area while the files are copied to the library

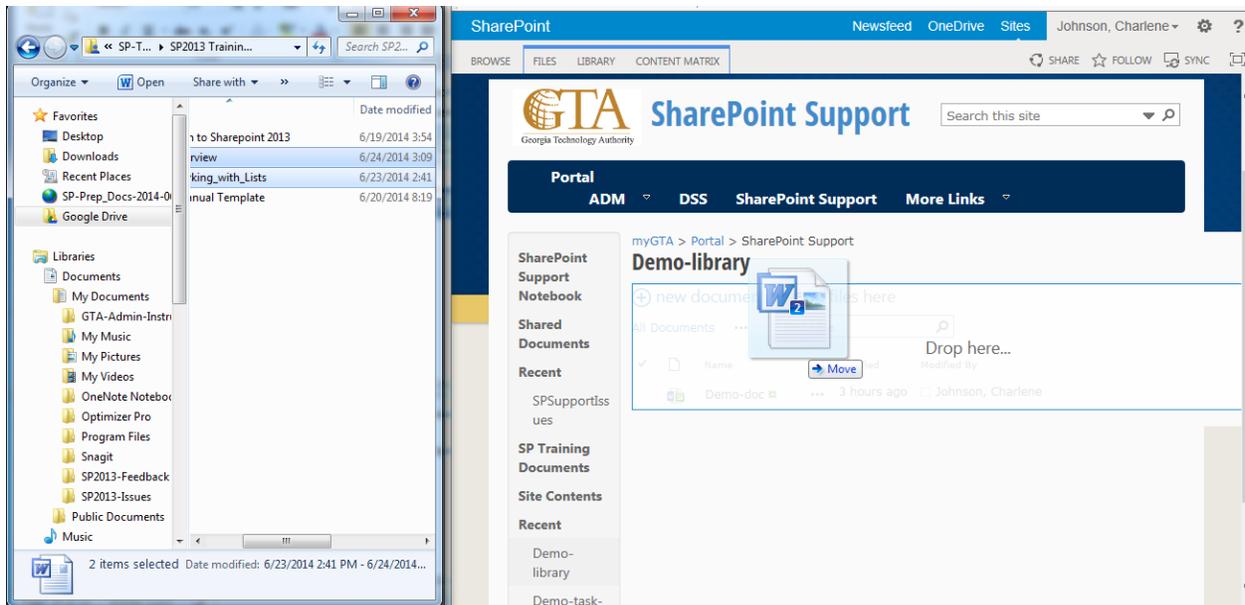


Figure 46 Drag here area when dragging documents to SharePoint

4. SharePoint will add the documents to the library

11.2 Upload Documents

You can also populate a document library by browsing for the document and uploading it.

Note: You must have permission to add content to a document library.

To upload documents to a library,

1. Select a library
2. Click **new document**

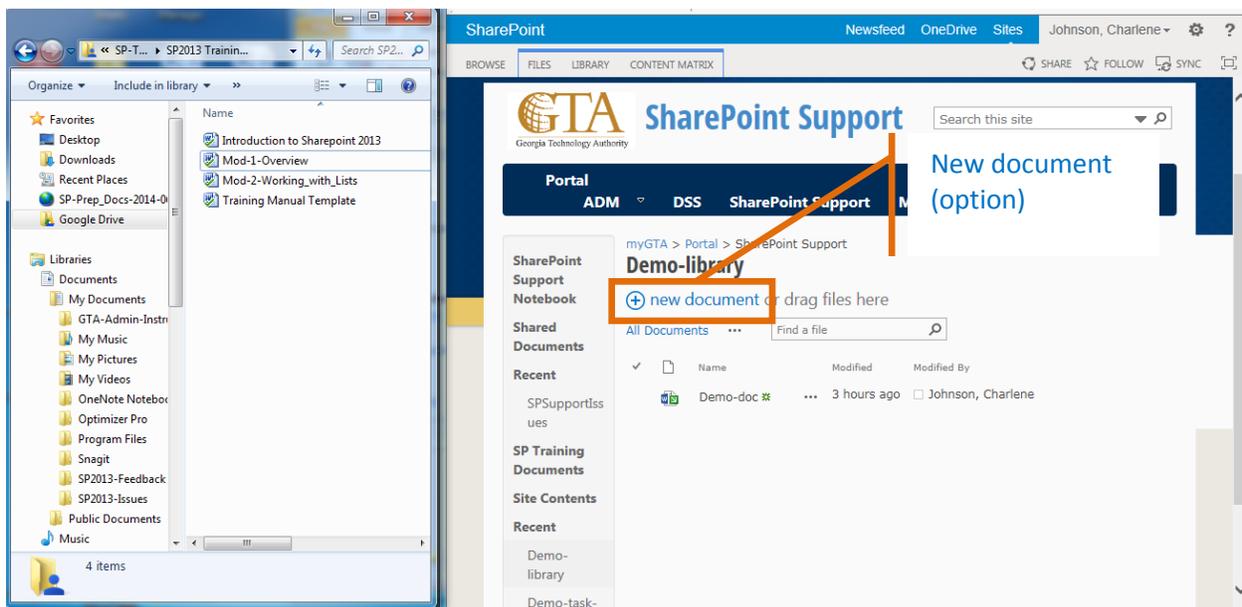


Figure 47 New document option on the document library page

3. SharePoint will display the **Create New File** box
4. Select **UPLOAD EXISTING FILE**

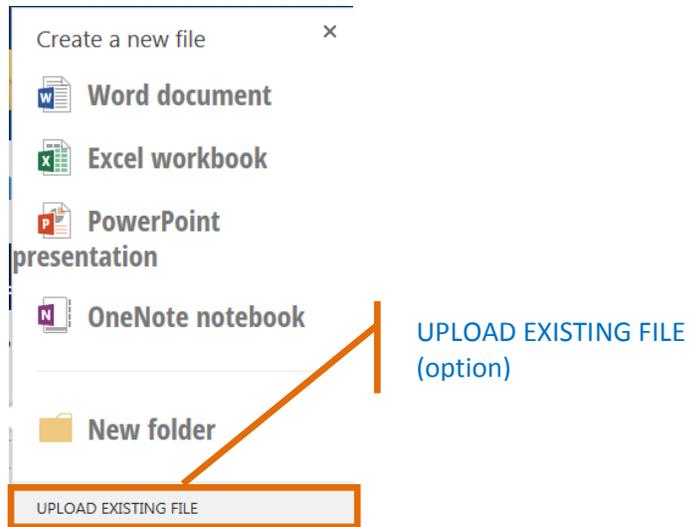


Figure 48 UPLOAD EXISTING FILE button on Create a new file box

5. Click **Browse** to find the file that you want to upload, e.g. Resource Materials

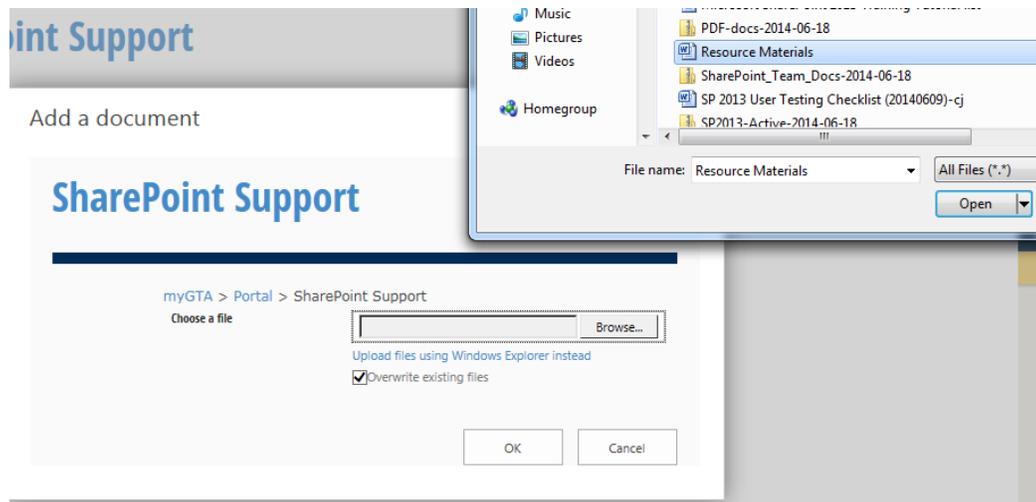


Figure 49 Open option when selecting a document for upload

6. Click **Open** to select the file and then click **OK**
7. SharePoint will add the file to the library

11.3 Create Documents

You can also populate a document library by creating the document from SharePoint.

Note: You must have permission to add content to a document library.

To create a new document from SharePoint,

1. Select the library where you want to add content.
2. Click **new document**

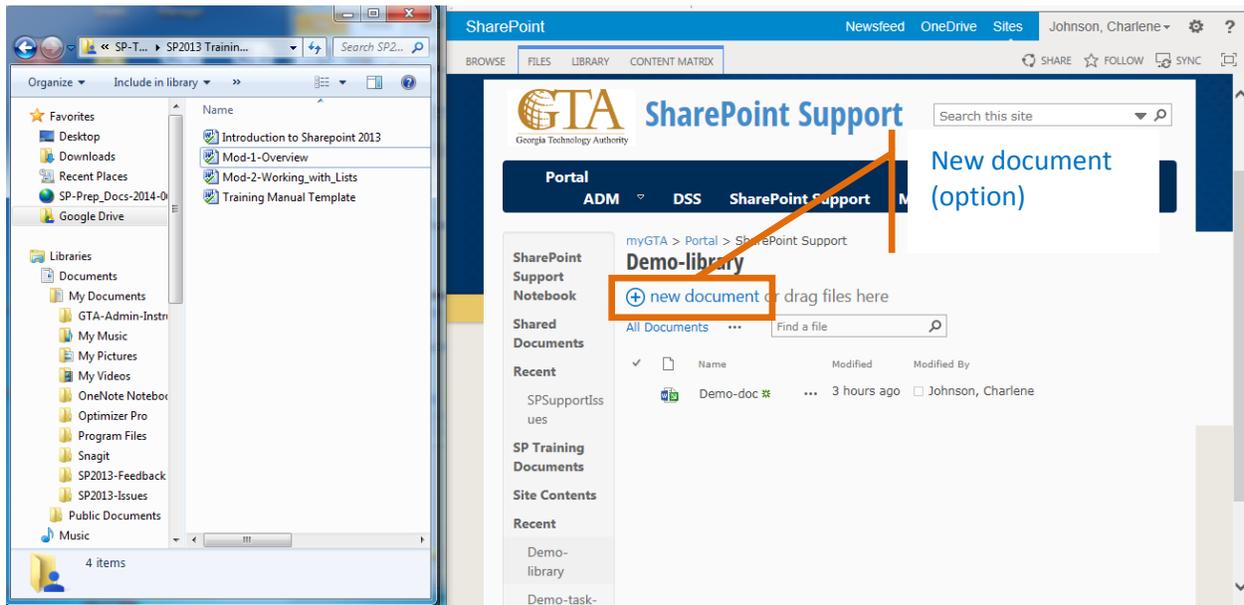


Figure 50 New document option on document library page

3. SharePoint will display the **Create New File** box
4. Select the type of document you want to create, e.g. Word document

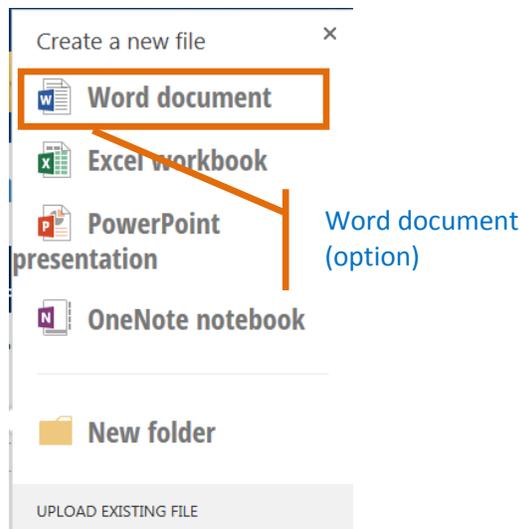


Figure 51 Word document button on Create a new file box when opening web version of Word

5. SharePoint will display the **Create a new document** box
6. Enter the **Document name** in the title box, For this example, Test-Document is the **Document name**
7. Click **OK**

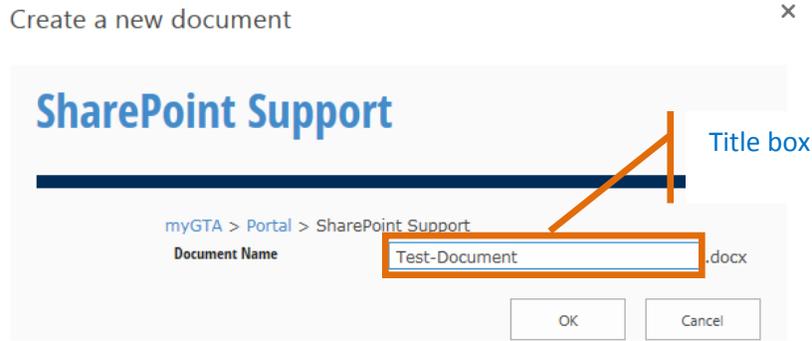


Figure 52 Title box when creating a new document

- SharePoint will open the web version of the application. You can create your document and save it, and it will be stored in your SharePoint Library.

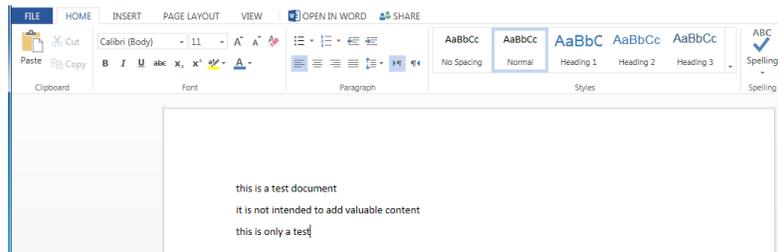


Figure 53 Web version of Word when creating a new document

Apply Your Knowledge: Exercises

Complete **Exercise 11: Add Library Documents** in your [SharePoint Basic Concepts: Exercises](#) manual.

12.0 Work with Lists

A list is a container for information. Lists are similar to a very simple database or spreadsheet. In SharePoint 2013 you can use a personal list or a team list. Similar to documents, you can sort or filter lists. You can also display lists in various views, such as the spreadsheet view or the calendar view.

12.1 Add New List Items

You can populate a list by adding a new item.

To add a new item to a list,

- Select the list you want to edit. Click **new item**

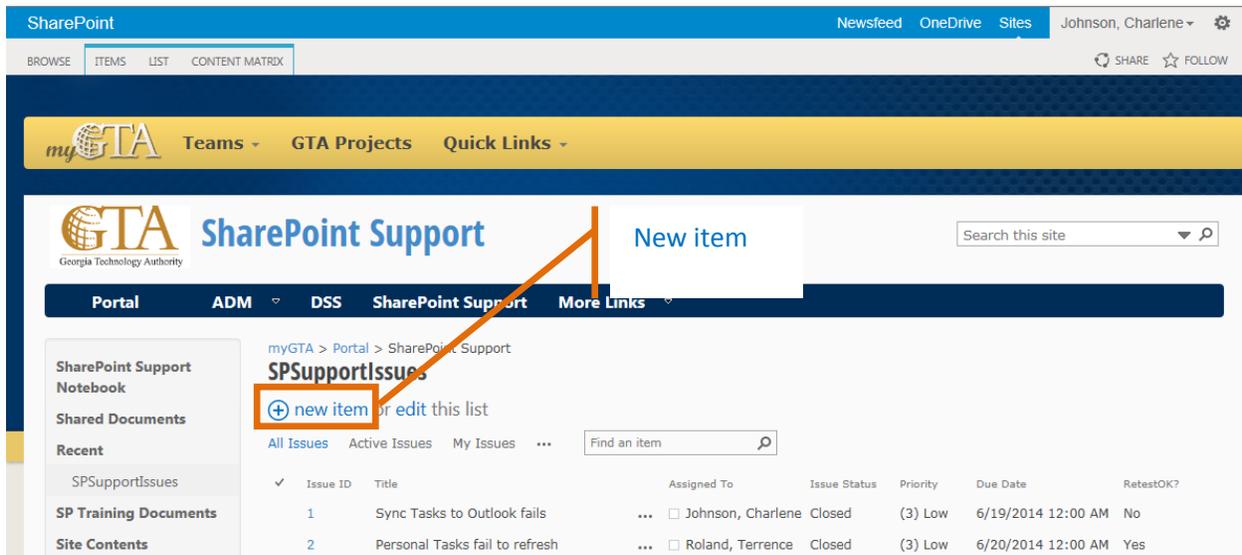


Figure 54 New item icon when adding information to a list

2. SharePoint will display the form you can use to enter information
3. Enter the data and click **Save**

Note: There is a **Save** icon in the list ribbon and there is a **Save** button at the bottom of the form. You can use either of them because they both do the same thing.

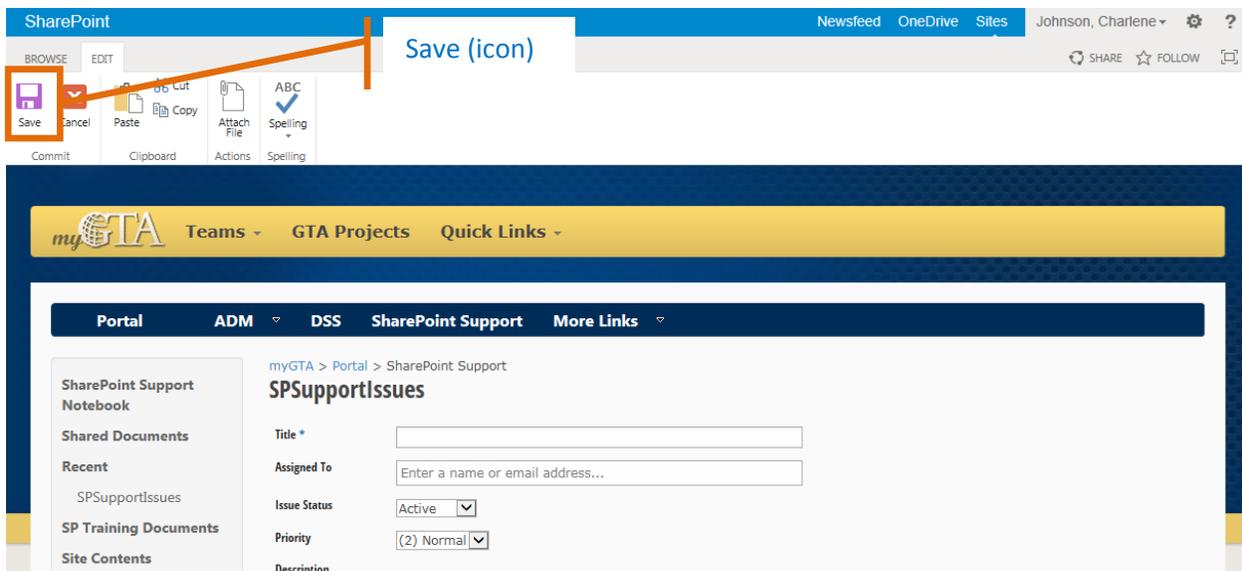


Figure 55 Data entry form when adding information to a list

4. SharePoint will add the information to the list

12.2 Spreadsheet View

The standard view of a list consists of rows of information. You can change the view to display the list as a spreadsheet. This will allow you to use Excel commands to work with the list.

To display the list using a spreadsheet view,

1. Select a list
2. Click **edit this list**

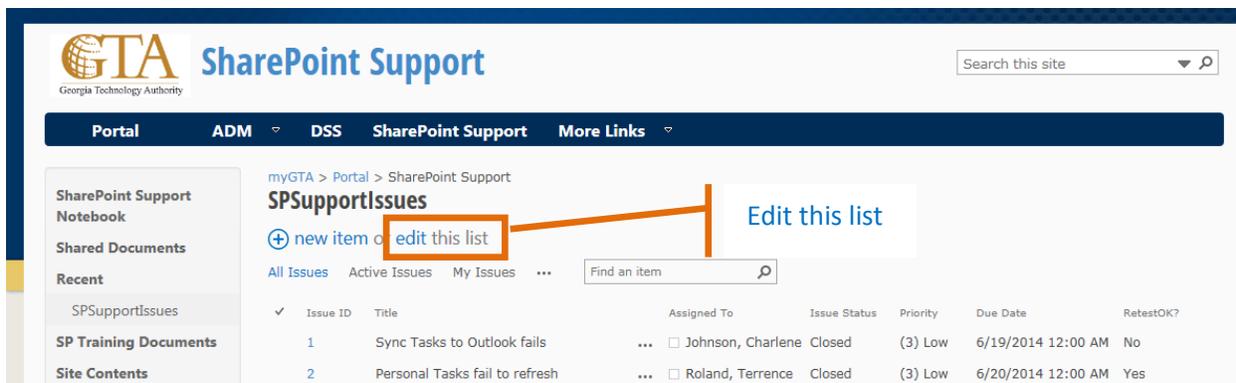


Figure 56 Edit this list when editing list information

3. SharePoint will display the list in a spreadsheet and you can edit the information
4. When you are finished editing the information, click **Stop editing this list**

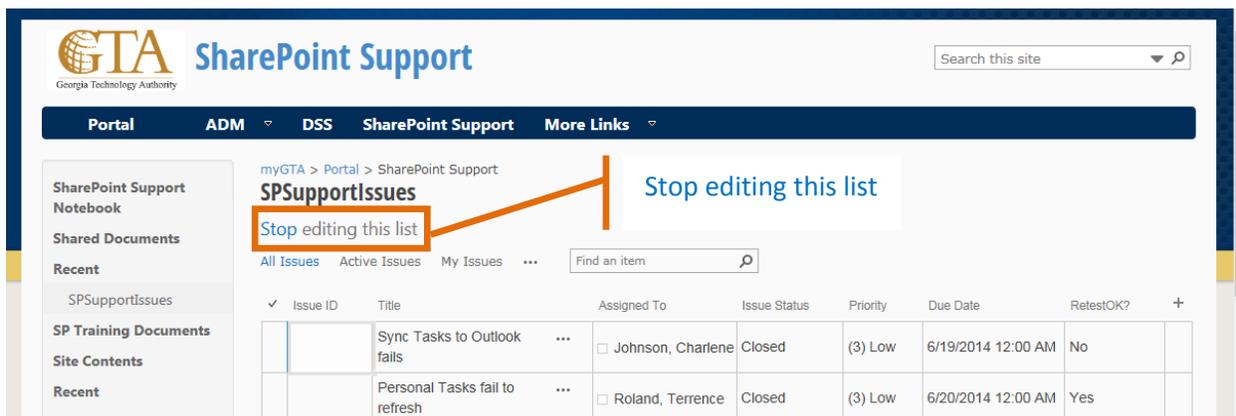


Figure 57 Stop editing this list when editing is finished

Apply Your Knowledge: Exercises

Complete **Exercise 12: Work with Lists** in your SharePoint Basic Concepts: Exercises manual.