SharePoint 2013 Quick Reference

Click a link below to jump to a topic:
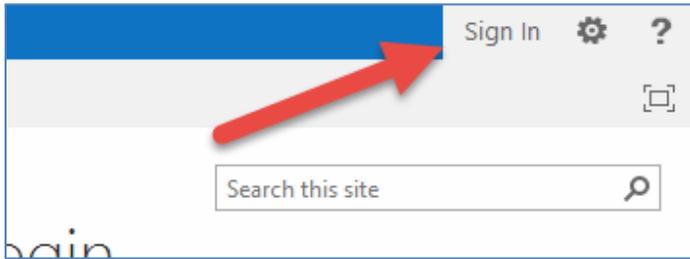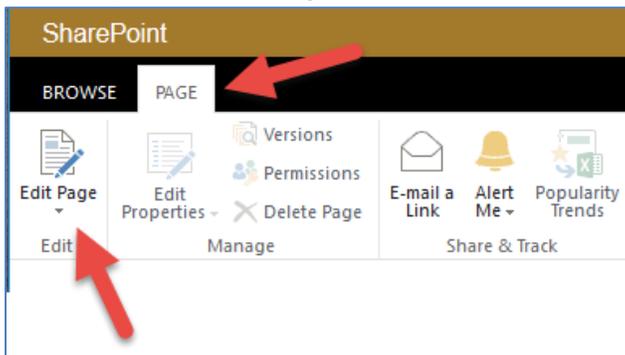
1. How To Sign In

1. Sign In

   Sign into SharePoint by clicking "**Sign In**" at top right:

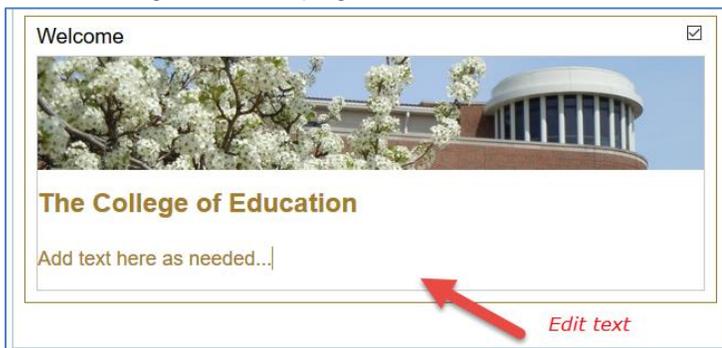   If prompted to authenticate, use Your Purdue Career Account.

2. How To Edit Text In A Content Editor Webpart

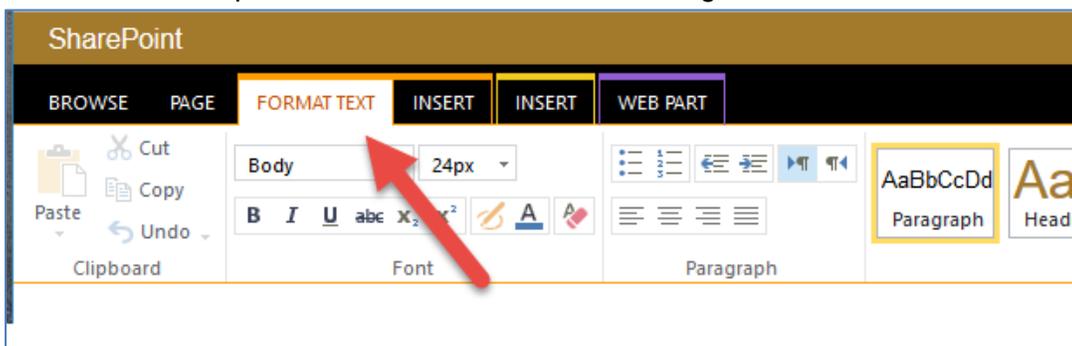1. Log in and locate the page that contains the text you need to edit.
2. At the top, click the "Page" tab and then click the "Edit Page" button on the toolbar:

3. Click the region on the page that contains the text and begin editing the text:

4. Note that at the top there will be a toolbar for formatting text:

5. After you have made your edits, click the "Page" tab and then click "Stop Editing":
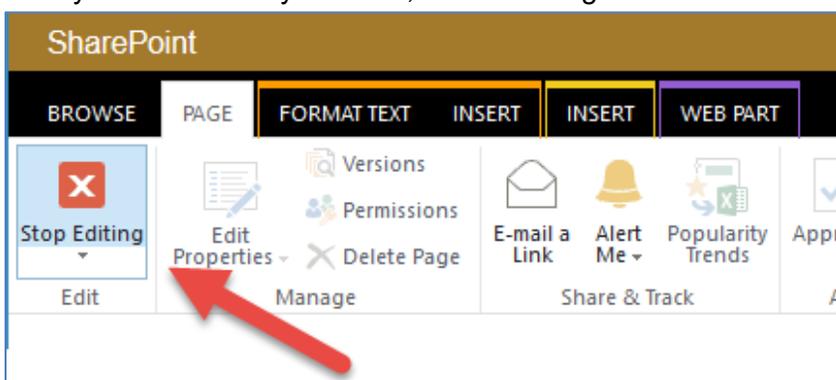
3. How To Create A Folder

1. Navigate to document library where the new folder will be created:

2. Once you're in the location where you want to create a new subfolder, click the "Files" tab:

Now click the "New Folder" button:

In the window that appears, enter the name of the folder and click "Save."

4. How To Upload Files
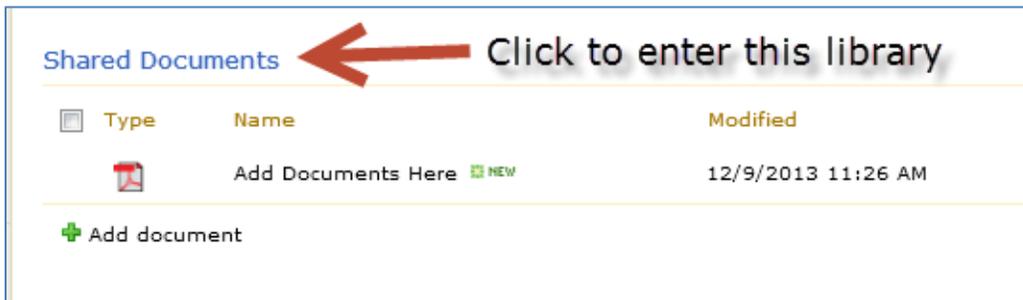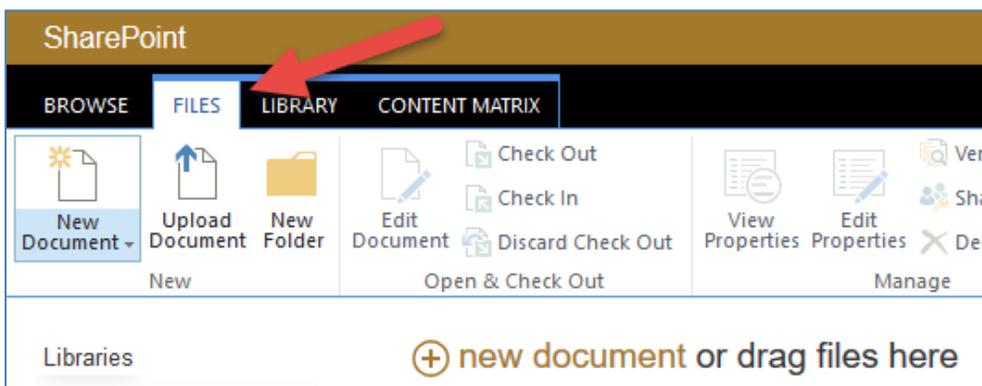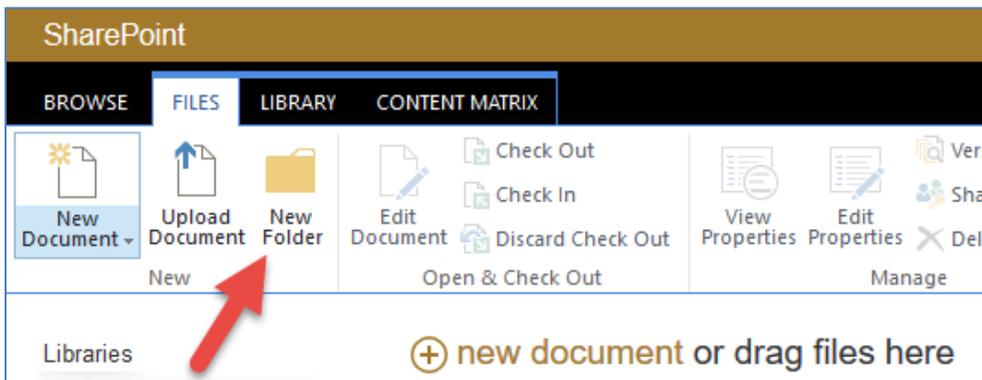
1. Sign In

   Log in by clicking "**Sign In**" at top right.

2. Navigate INTO the folder where you want to place your new files by clicking the name of the folder:
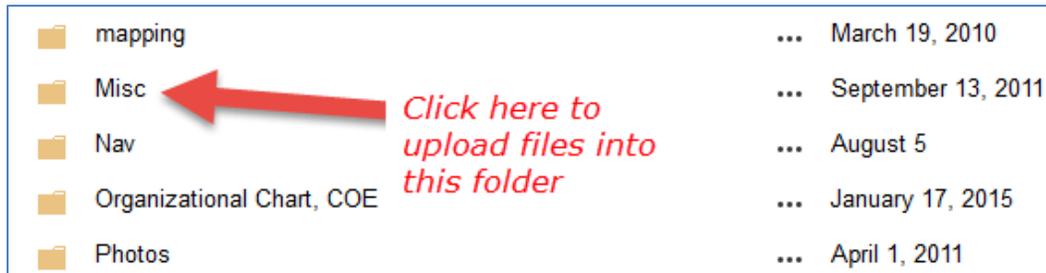
3. Once you're in the folder where you want to upload your files have two options, (1) click "new document" and follow the prompts to locate a document on your computer; or (2) drag and drop one or more files from your computer onto the "drag files here" area of the page:
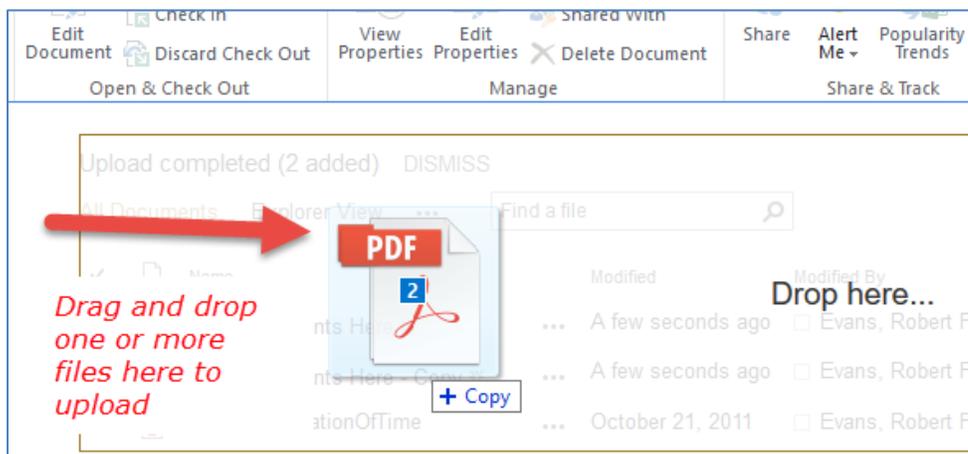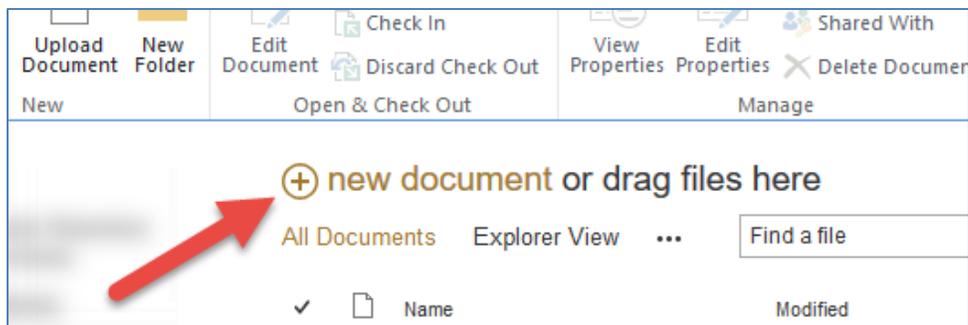
   (Note: this method does not support uploading folders)

5. How To Move Files and Folders

1. Navigate to the location where your files and folders exist.

2. If you simply want to move one or more files into a subfolder in the existing location, you can check the checkboxes next to each file you want to move, and then drag the file icons onto a folder name:

3. If you want to move files to a folder in another location: locate the document; click the three dots to the right of the name; click the three dots in the pop-up; hover over "Manage Selection" and th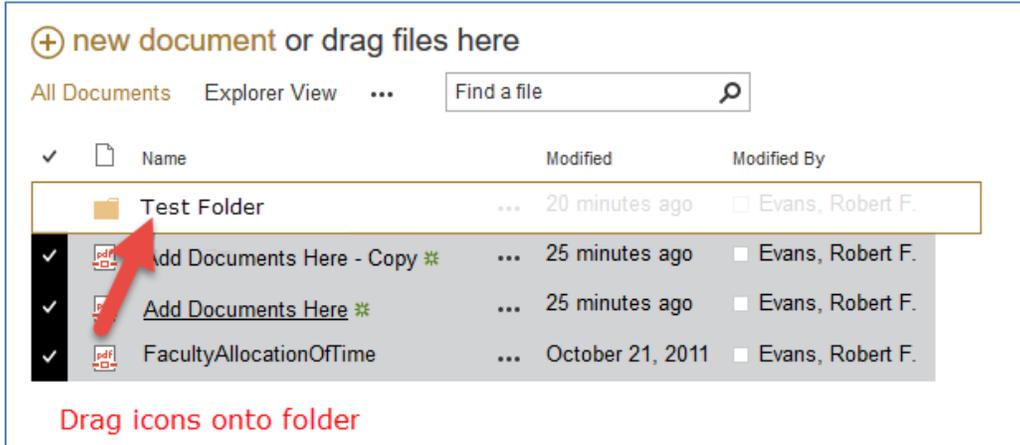en select "Move." Then follow the prompts to select the new site / library / folder where the files(s) should be moved:
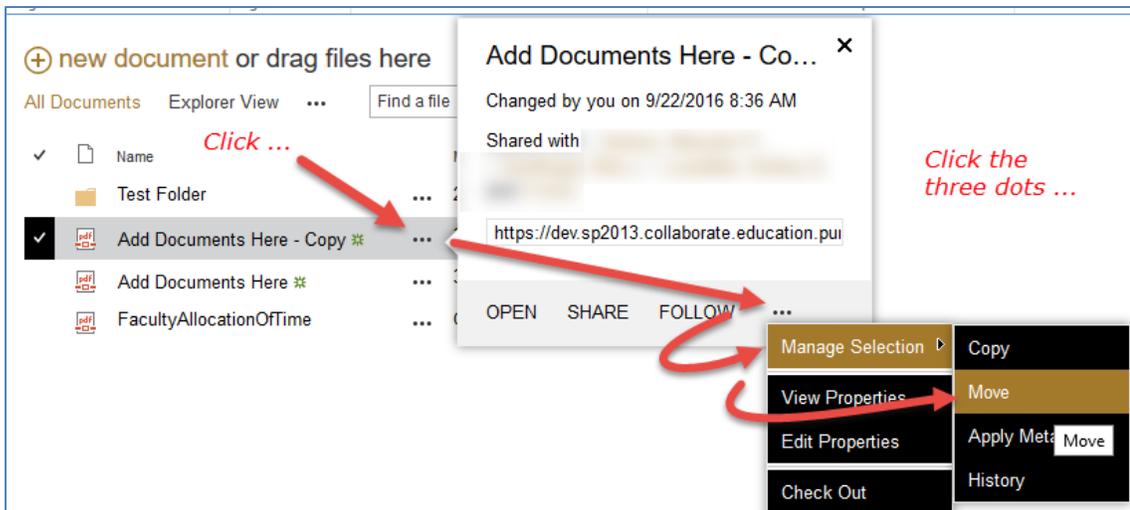
Note: When SharePoint shows the message "Working on it…" please wait for the page or item to fully load before continuing to click. This is a subtle thing, but very important!

To navigate to the Parent folder, click the "Library" tab and then click "Navigate Up":
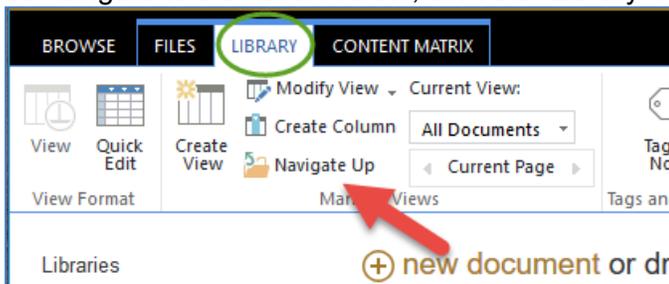
6. How To Add/Remove Users To/From A Site

1. Sign In

   Sign into SharePoint by clicking "**Sign In**" at top right:

2. Go to "Site Settings"

   Click the "Settings" gear at top right and then select "Site settings":

   Click "Site permissions" under the "Users and Permissions" area:

3. Add Users:

   Click the name of a group:

Within the group settings, click the "New" menu and select "Add Users":

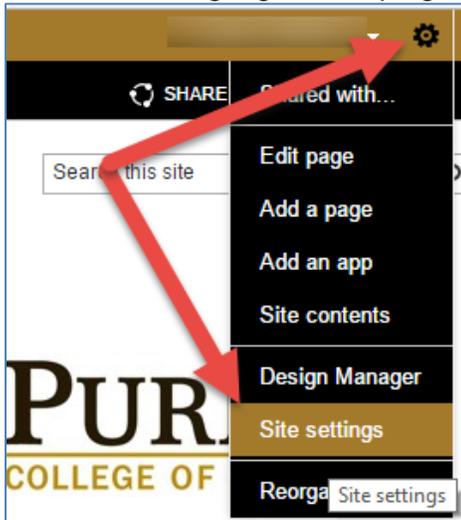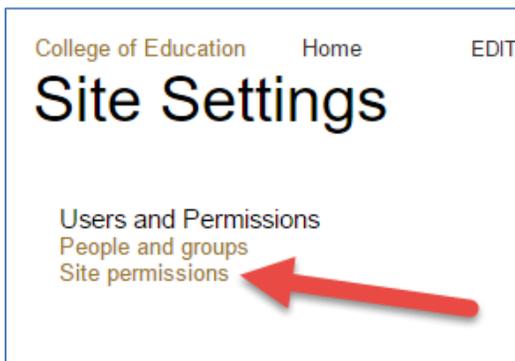4. Enter Purdue Career Account IDs or Names:

Begin typing career account IDs or names. Matching names will automatically appear as you type and you can select them from the list that appears. When all users are added, click the "Share" button:
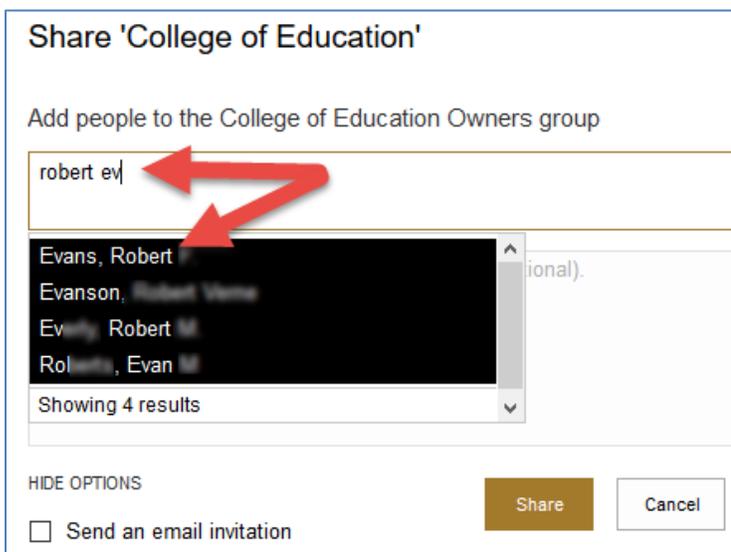
Note: Click "Show Options" and un-check "Send an email invitation" if needed.

Note: If you are <u>adding</u> a <u>group</u>, you will need to select "SHOW OPTIONS" and then select a <u>permission level</u> to grant to the group (you must select a permission level and not the name of a group since groups cannot be nested in SharePoint).
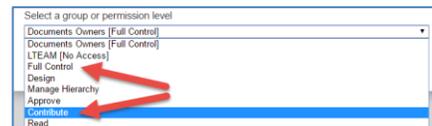
5. Remove Users

Click the checkbox next to one or more names and then click the "Actions" menu and select "Remove Users from Group":
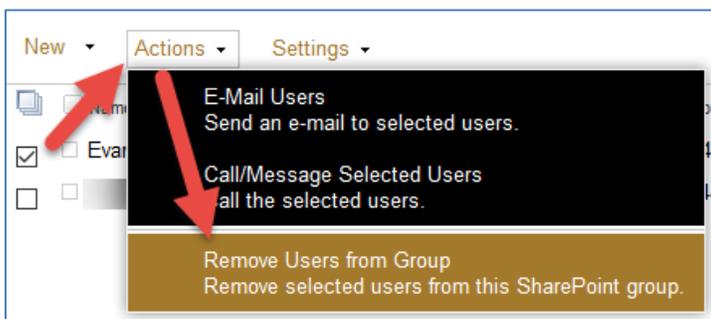
7. How To Connect To A Document List With Windows Explorer (or with a Mac)

1. Sign into SharePoint by clicking "**Sign In**" at top right.

2. Navigate to the SharePoint site using your web browser. Here is an example:

(do <u>not</u> use this example address)

3. Click and highlight the address and then <u>Copy</u> it using Ctrl+C.

4. Go to Windows Explorer and <u>Paste</u> the address into the location bar and then <u>remove</u> anything after the main name of the site (such as "default.aspx…"). Then press enter in the location bar and Windows Explorer will attempt to connect to SharePoint:

(the address used below is an example only, do not use!)

You may be prompted to log in again. Windows Explorer should now open the SharePoint site and you can navigate through the folders as usual and copy / paste / edit / delete documents and folders as usual.

[If for some reason this does not work, this method may not be supported on the specific network and/or your computer you are using. Contact Education IT.]
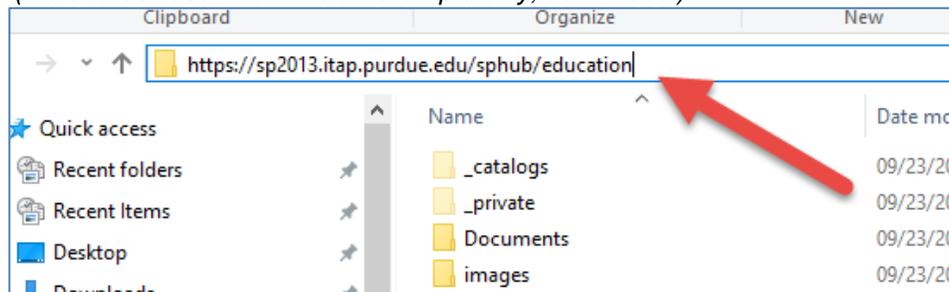
If you are using a Mac, use the same web address described above:

> **https://sp2013.itap.purdue.edu/sphub/education**   *(← example address, do not use!)*

…and use the Finder "**Go**" menu to "**Connect to Server**" as usual (copy the web address into the "Server Address" box on the Mac). For more information about how to connect to a server on a Mac, see:

https://support.apple.com/en-us/HT204445

Notes: **If you have trouble connecting**, be sure to **remove** anything from the SharePoint address that is not the **main name of the site** or **the name of a document library**. For example, if you have an address that looks like this:

https://sp2013.itap.purdue.edu/sphub/education/Documents/Forms/DispForm.aspx?ID=1&Source=https%3A%2F%2Fsp2013%2Eitap%2Epurdue%2Eedu%2Fsphub%2Feducation%2FDocuments%2FForms%2FAllItems%2Easpx&ContentTypeId=0x0101000C6E638619D28949920EB2CD95DAED1C&RootFolder=%2Fsphub%2Feducation%2FDocuments

You will need to **remove** everything after the main name of the site, or document list, so that the address looks something like this:

https://sp2013.itap.purdue.edu/sphub/education/Documents   *(← example address, do not use!)*
      --or--
https://sp2013.itap.purdue.edu/sphub/education   *(← example address, do not use!)*

Then use these **shorter names** in the **"Folder" field** when mapping a drive.

8. How To Add A Persistent Network Location

If you want to add a SharePoint document list to your Windows computer so it is always present in Windows Explorer, you can "map a network drive" using the steps below.

1. Navigate to a SharePoint site or file list using your web browser. Here is an example:

   (do not use this example address)
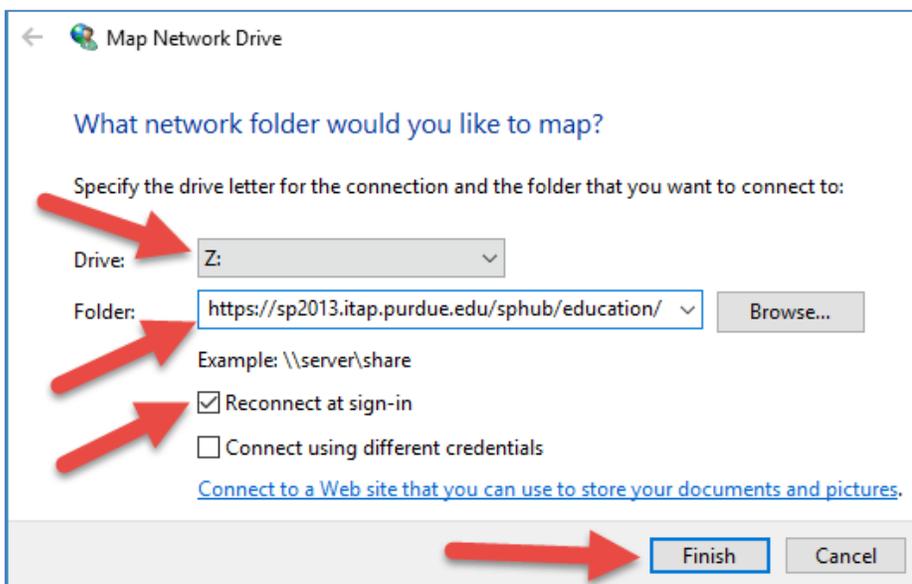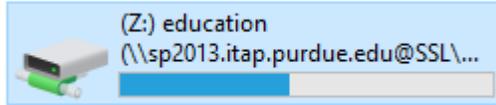

2. Click and highlight the SharePoint address and then Copy it using Ctrl+C.

3. Go to Windows Explorer and locate the "Network" icon in the left column. Right-click "Network" and select "Map network drive…":
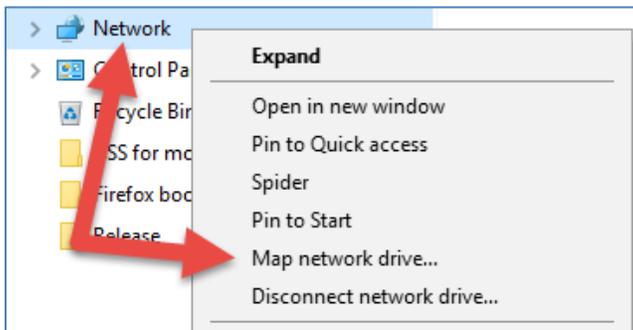
4. Paste the SharePoint address into the "Folder" field and then remove anything after the main name of the site or document library (such as "default.aspx…")

5. Choose a drive letter and click "Reconnect as sign-in" and then click "Finish."

6. Windows will now try to connect to the SharePoint site and "map a drive letter" on your computer. When you go to "This PC" you should now see a new drive letter that points to the SharePoint site:

Notes: **If you have trouble connecting**, be sure to **remove** anything from the SharePoint address that is not the **main name of the site** or **the name of a document library**. For example, if you have an address that looks like this:

https://sp2013.itap.purdue.edu/sphub/education/Documents/Forms/DispForm.aspx?ID=1&Source=https%3A%2F%2Fsp2013%2Eitap%2Epurdue%2Eedu%2Fsphub%2Feducation%2FDocuments%2FForms%2FAllItems%2Easpx&ContentTypeId=0x0101000C6E638619D28949920EB2CD95DAED1C&RootFolder=%2Fsphub%2Feducation%2FDocuments

You will need to **remove** everything after the main name of the site, or document list, so that the address looks something like this:

https://sp2013.itap.purdue.edu/sphub/education/Documents   *(← example address, do not use!)*
        --or--
https://sp2013.itap.purdue.edu/sphub/education   *(← example address, do not use!)*

Then use these **shorter names** in the **"Folder" field** when mapping a drive.

If you are using a Mac, use the same web address described above:

https://sp2013.itap.purdue.edu/sphub/education   *(← example address, do not use!)*

…and use the Finder "**Go**" menu to "**Connect to Server**" as usual (copy the web address into the "Server Address" box on the Mac). For more information about how to connect to a server on a Mac, see:

https://support.apple.com/en-us/HT204445

# 9. How To Import Folders Into A Document List

1. Even though SharePoint 2013 allows drag and drop importing of <u>files</u> into a document list (see item #4 above), importing <u>folders</u> cannot be done via drag and drop.

   However, **it is possible import folders** into SharePoint 2013 and the process is fairly easy. Using item #7 above, you can connect to a document list with Windows Explorer (or a Mac) and then once connected, you can copy/paste folders (and files) into the connected location.

   Please refer to item #7 above for instructions on how to connect to SharePoint using Windows Explorer (or Mac).

10. How To Delete A File or Folder

1. Navigate to a document list and find the file(s) or folder(s) you need to delete.
2. Check the checkboxes beside each item you want to delete.
3. Go to the "FILES" tab and click the "X" icon to delete all the items you have selected.
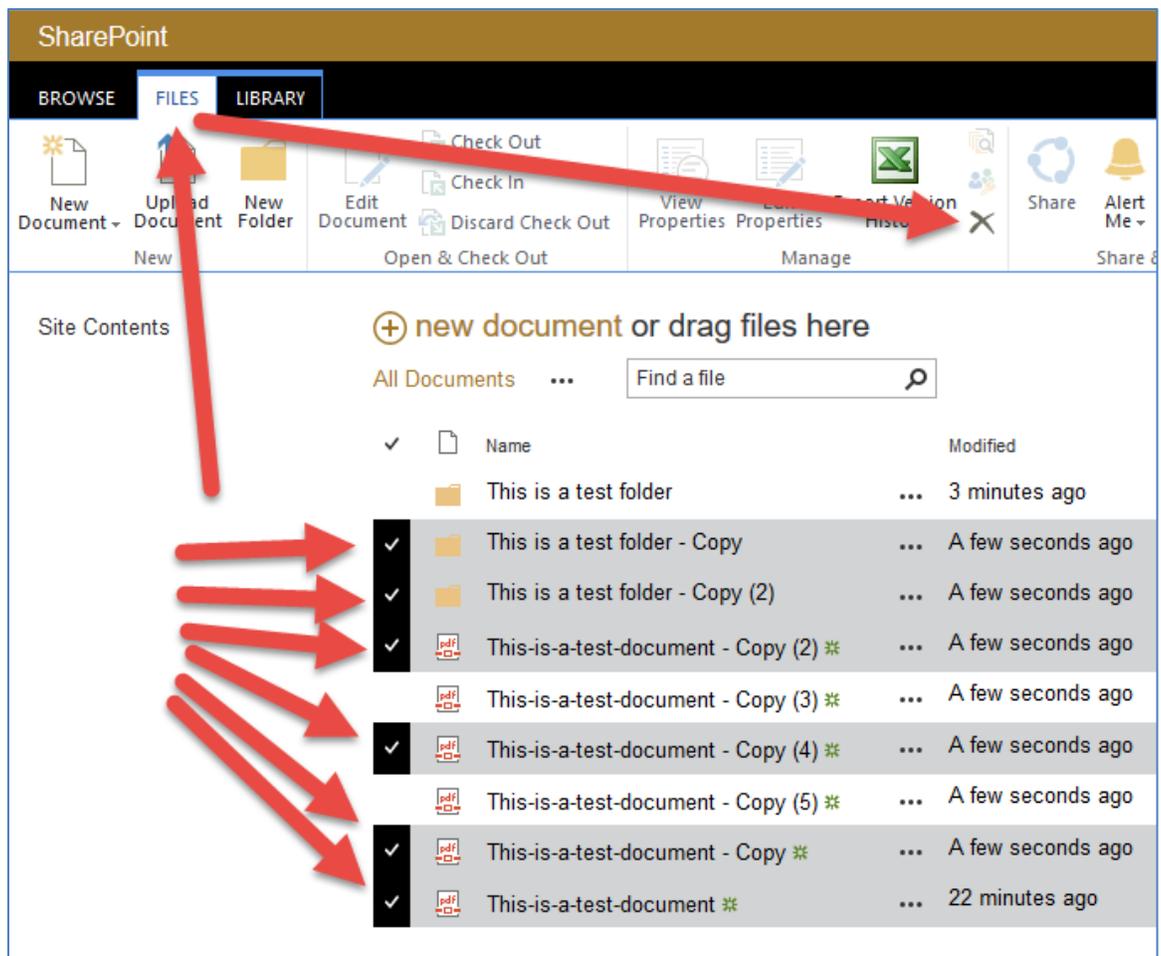
If you need to Un-Delete items (restore them from the Recycle Bin), go to the "Site Settings" **gear** and select "Site Contents":
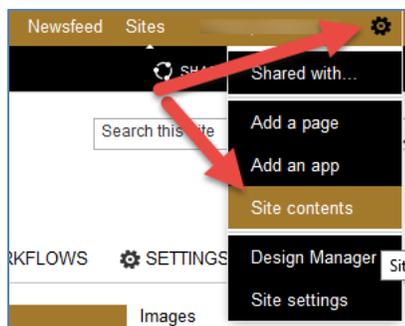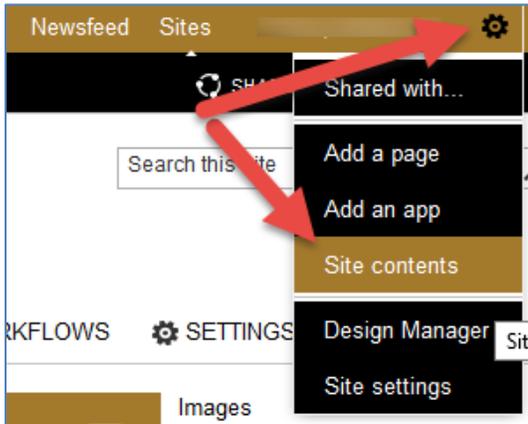

Then look for the link to the RECYCLE BIN and use the options found there to restore items.
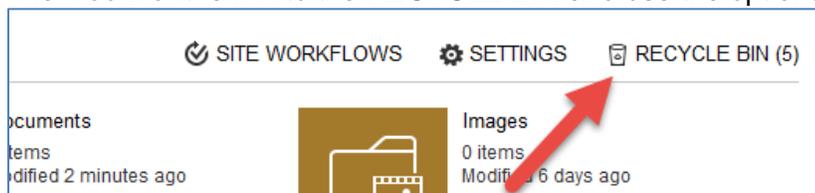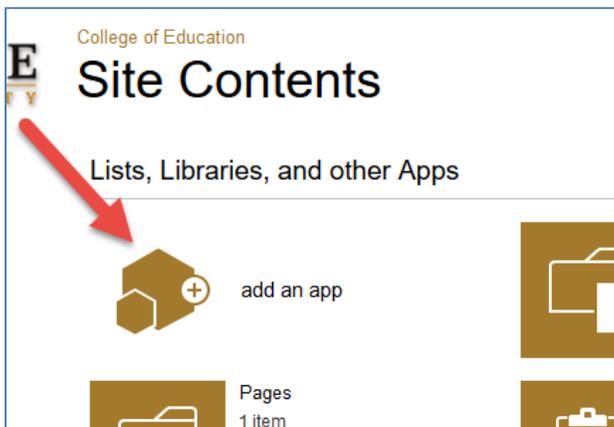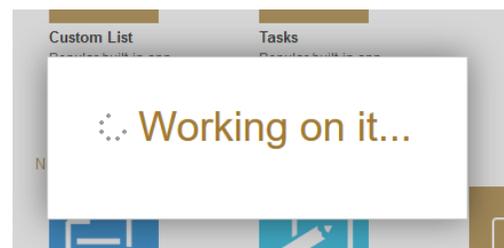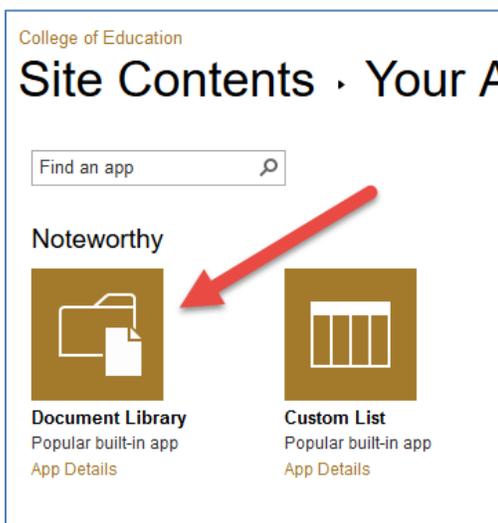
11. How To Create A New Document Library

1. Go to the home page of your site and click the "Settings" button at top right (the gear icon). Then select "Site contents":
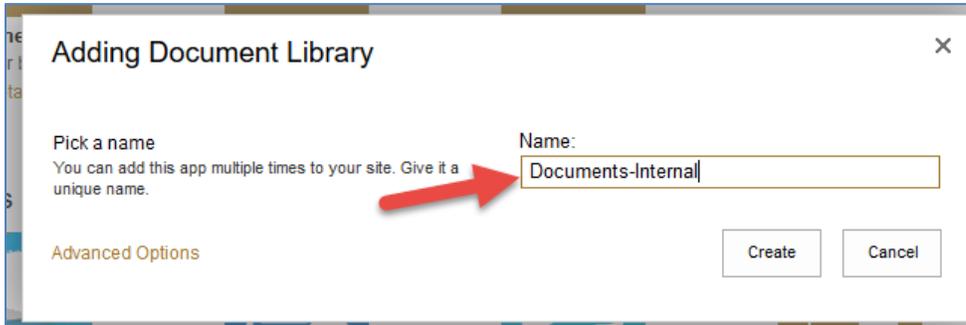

2. Click "add an app":

3. Select "Document Library":

…wait…

4. Give the Document Library a name (please do not use spaces in the name!) and then click "Create":


5. It is always a good idea to review the permissions on every new document library that you create to ensure that the right people have access to it, and that unauthorized users cannot access it. Locate the new document list, hover over it, and click the three dots that give additional options:
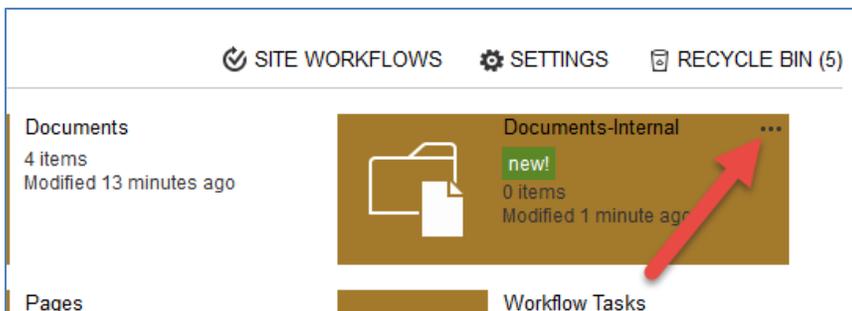
6. Select "SETTINGS" on the pop-up:
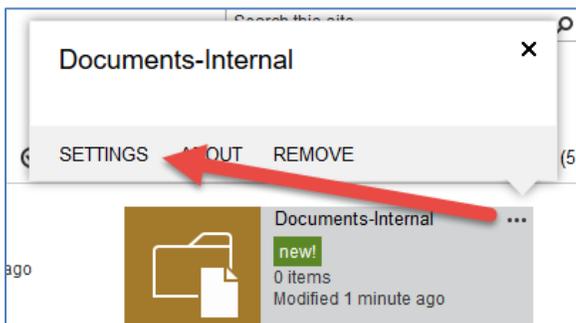
7. Click "Permissions for this document library":
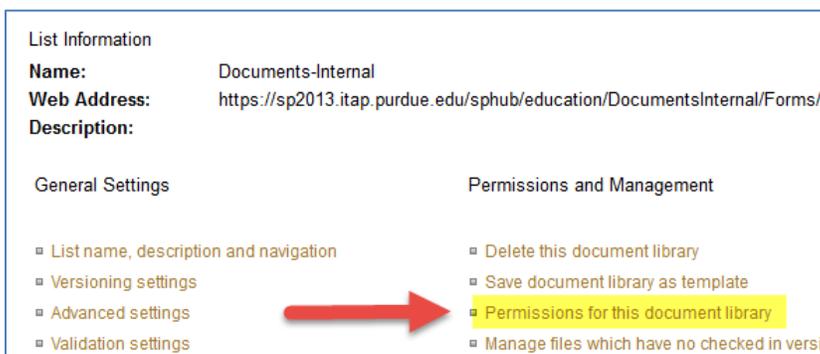
8. Review and adjust permissions as needed:

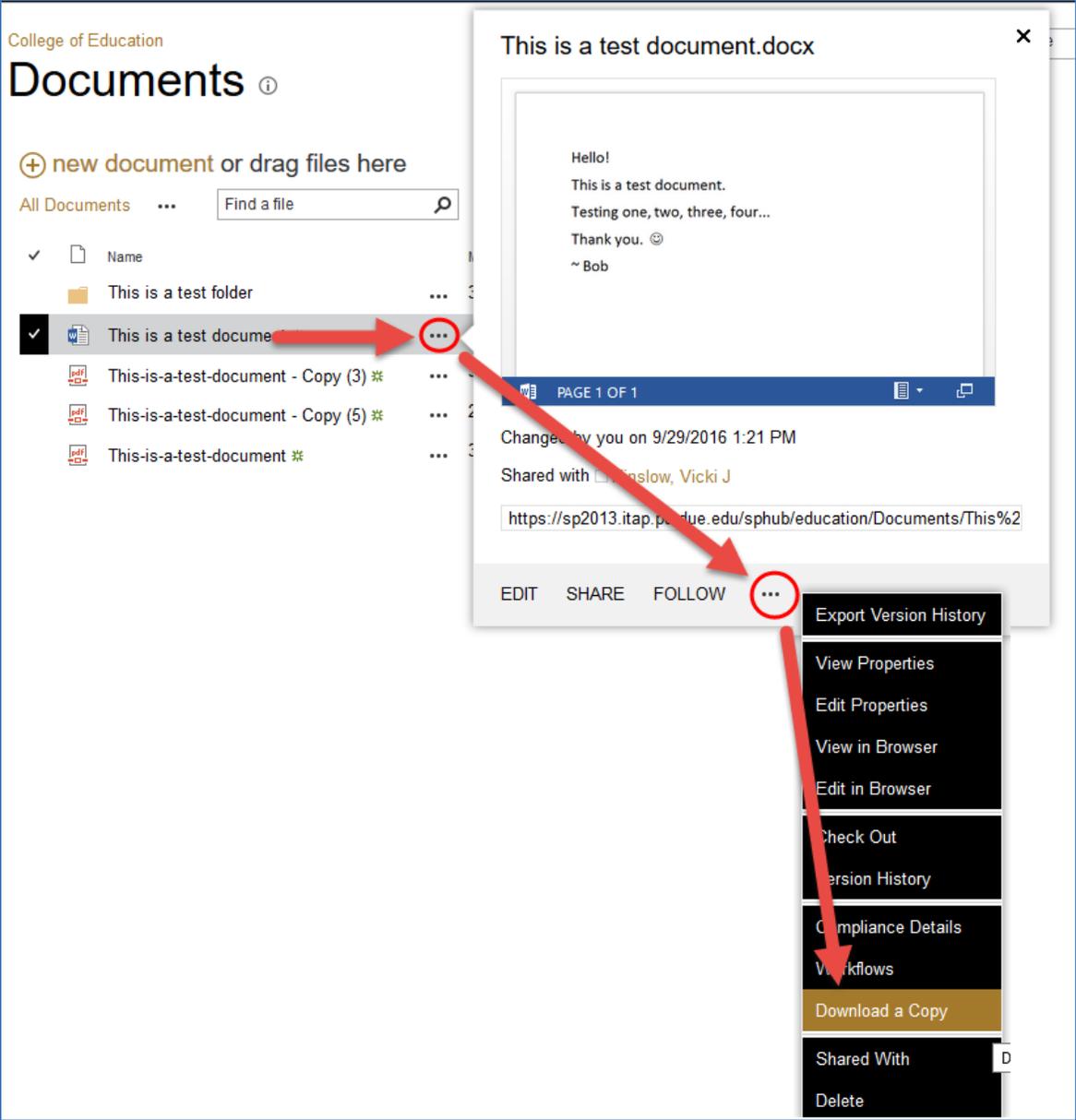| SharePoint			
BROWSE	**PERMISSIONS**		

Manage Parent · Stop Inheriting Permissions · Check Permissions

Inheritance · Check

⚠ This library inherits permissions from its parent. (College of Education)

Recent
    Documents-Internal
Site Contents

☐ Name	Type	Permission Levels
☐ College of Education Members	SharePoint Group	Contribute
☐ College of Education Owners	SharePoint Group	Full Control
☐ College of Education Visitors	SharePoint Group	Read

12. How To Download a Word / Excel Document

1. When you click a Word document in SharePoint, it may open in the built-in Word Viewer. If you would like to download a copy of a Word document (or other Office document such as Excel, PowerPoint, etc.), click the three dots next to the file name, then click the three dots at the bottom of the pop-up box, then select "Download a Copy" from the menu:

2. If you are linking to a SharePoint document and you want people to be able to download the document instead of having the document open in the online SharePoint viewer, you can add "?Web=0" to the end of the URL. Examples:

   https://collaborate.education.purdue.edu/edu/docs/Public/Sample-Word-Document.docx?Web=1

   https://collaborate.education.purdue.edu/edu/docs/Public/Sample-Word-Document.docx?Web=0