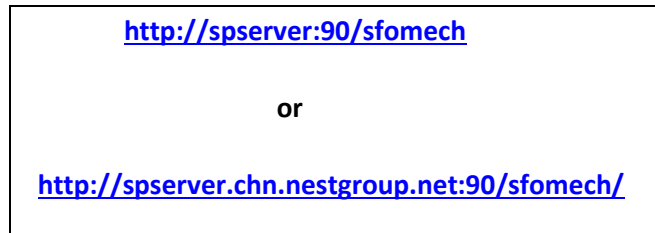


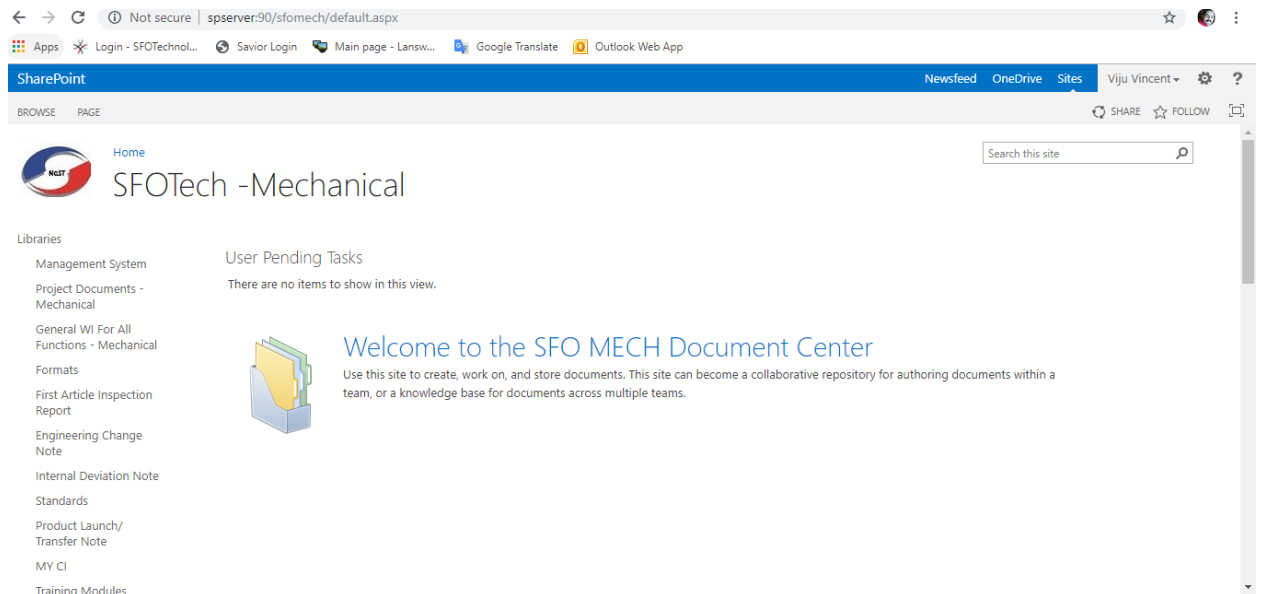
SharePoint 2013 Quick Reference User Guide

1. Navigate to SharePoint site

Launch a web browser (preferably internet explorer) and type the address of Sharepoint site.



The home page of the SharePoint site should look similar to the following:



2. Add new document

Method1

Step1: Locate and click **new document** and click **Browse** button to select and upload a document

http://chvm03/QA/Test/Forms/All... Home - Central Admi... Download Service Pa... Download Microsoft ... Test - All Docume... x

Home - Central Administr... Home - SFO-QA

SharePoint Newsfeed OneDrive Sites Viju Vincent ?

BROWSE FILES LIBRARY

est

Discussions

Documents

⊕ new document or drag files here

All Documents Approve/reject Items My submissions ... Find a file

Name	Modified	Title	approval -parallel	test	test doc workflow	Approval Status	Version
test	14 December, 2012	test				Pending	0.1
Dijin tonix PB HLA	27 October, 2014					Pending	0.1
File_Plan_Report_Test_2013-01-10T100309	10 January, 2013					Draft	0.1
Migrate farm solutions	3 days ago					Pending	0.1
test	21 February, 2014					Rejected	0.1
test111111	27 October, 2014					Pending	0.1
test222	8 December, 2014	aa				Pending	0.2

Add a document

Choose a file

[Upload files using Windows Explorer instead](#)

Add as a new version to existing files

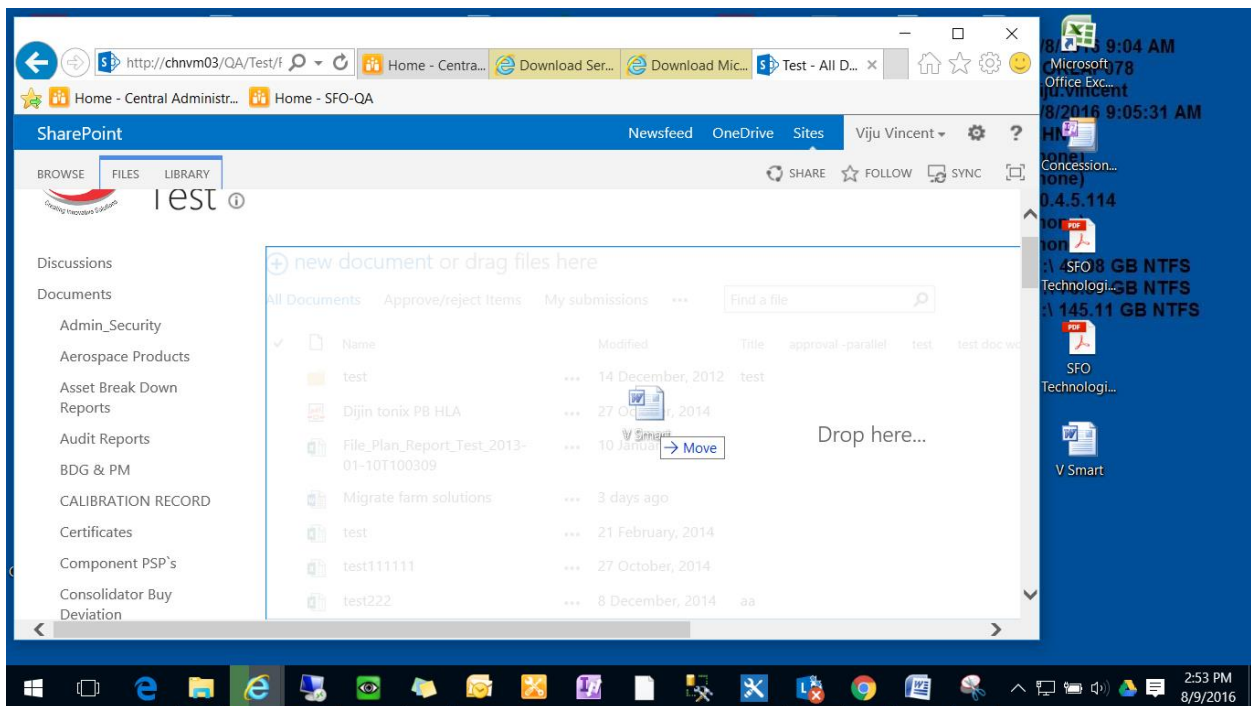
Destination Folder

Version Comments

Method2

Steps:

- 1) From the quick launch click **Library**.
- 2) From your local computer find the document you want to upload and drag it to the SharePoint document library where it says "**drag files here**"
- 3) Notice the section will become highlighted and it will say "**drop here...**", release the document.
- 4) After a few moments the document will be uploaded!

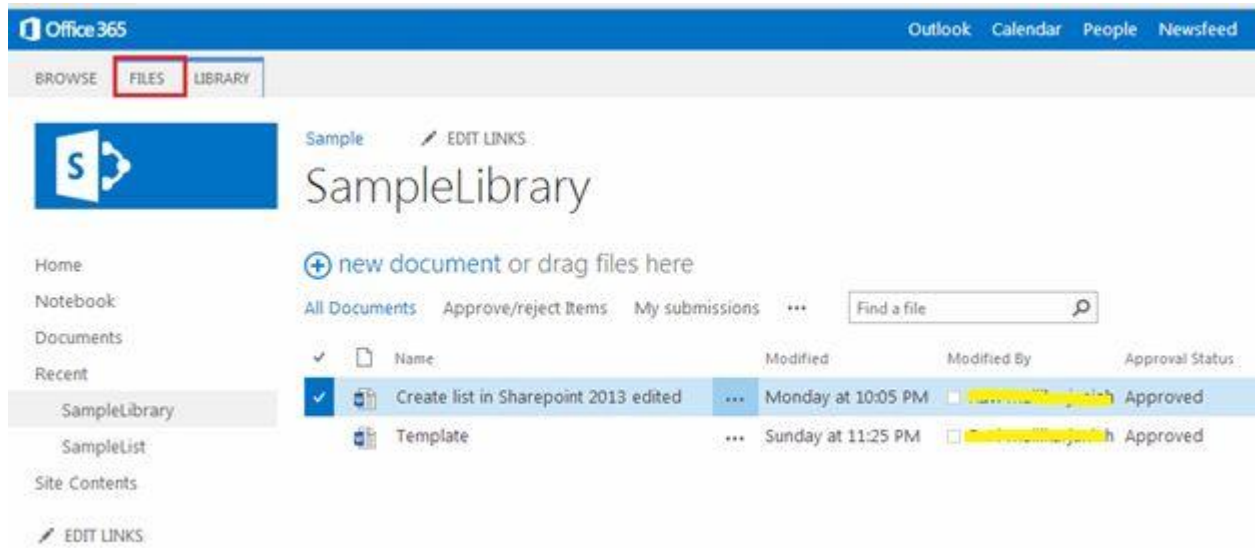


3. Edit Document

Steps: Check-out document->Edit document->Check-in document

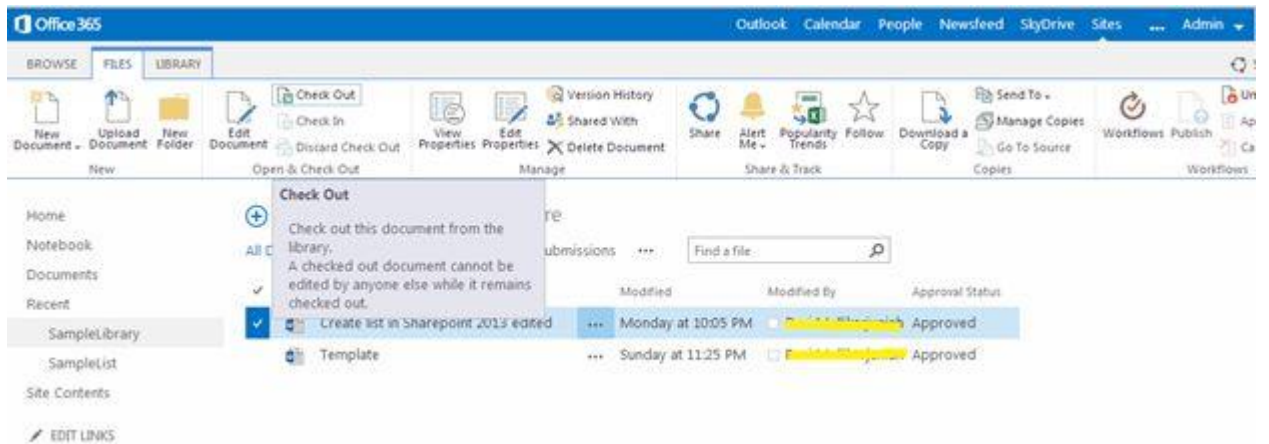
A) Check-out document before edit

Step1:select the document in the library, that you want to check-out as shown as below.

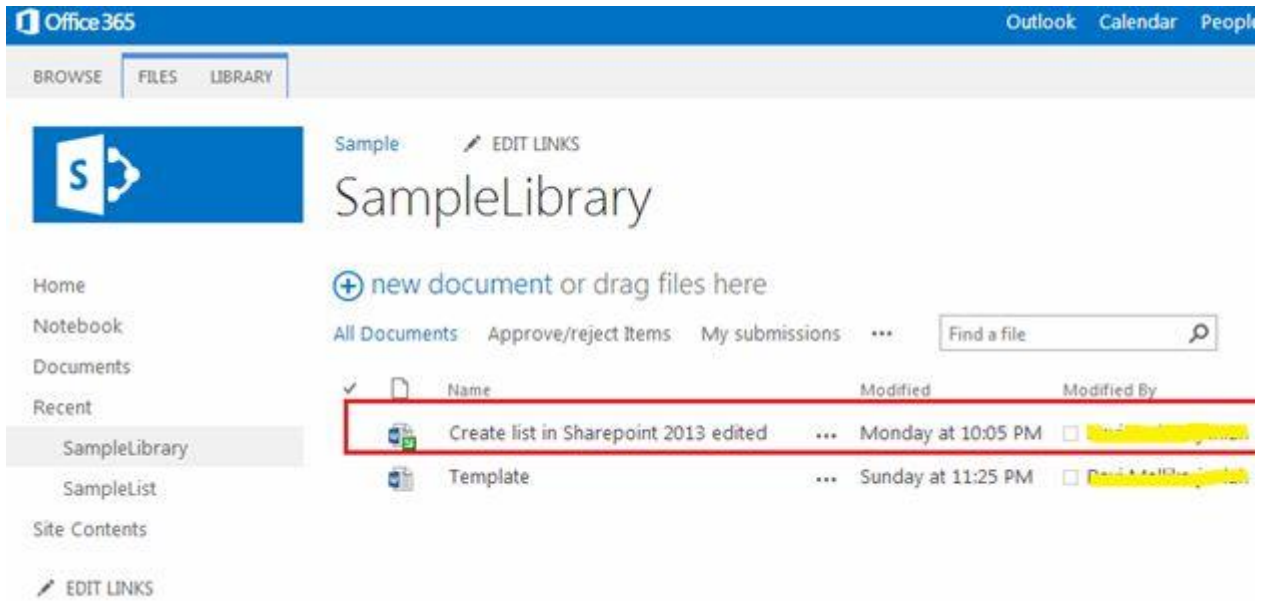


Step2:Click on the files option in the top ribbon bar and then select the check-out option on your ribbon as shown below.

1.

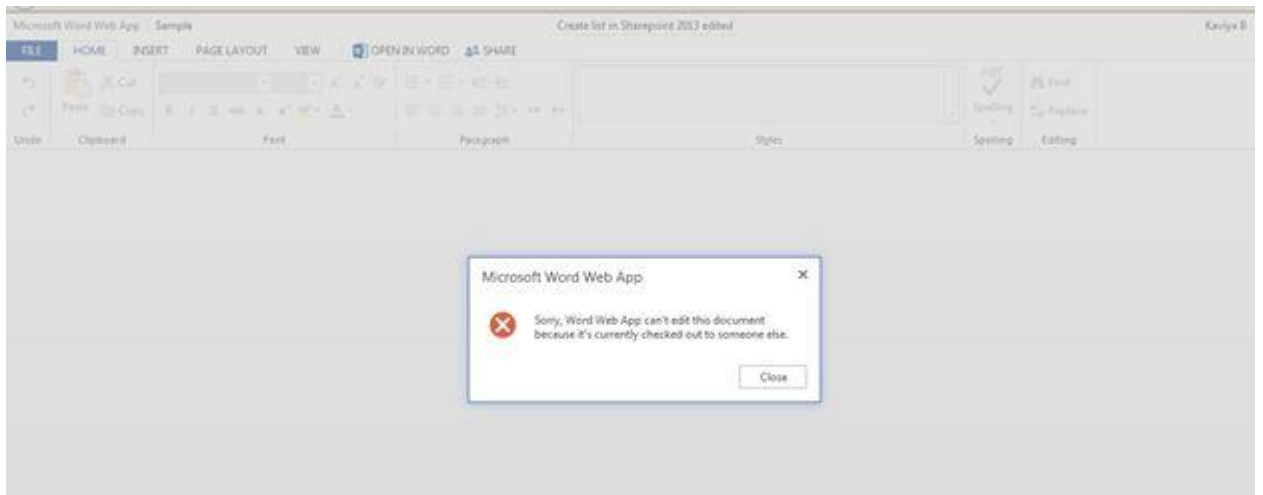


Step3:When you click on the check-out option in your ribbon the document will be checked out as shown below.

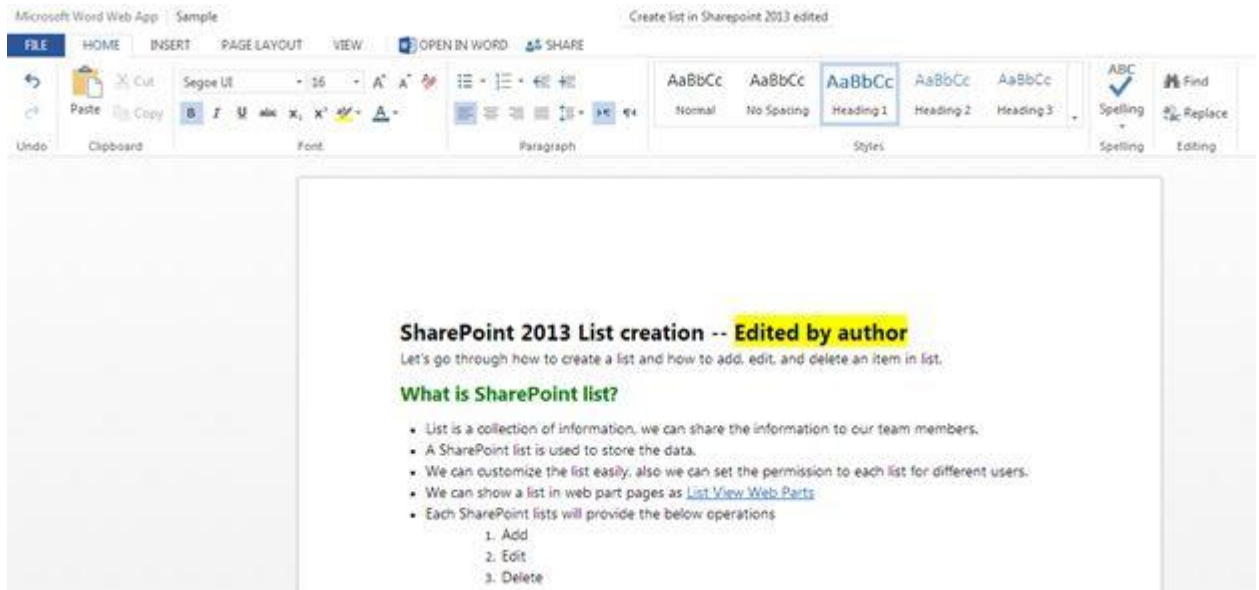


If you have checked out the file then other users cannot change the file. Other users can edit the documents only after you have checked-in the files.

If other users try to edit the document then they will get an error message as shown below:



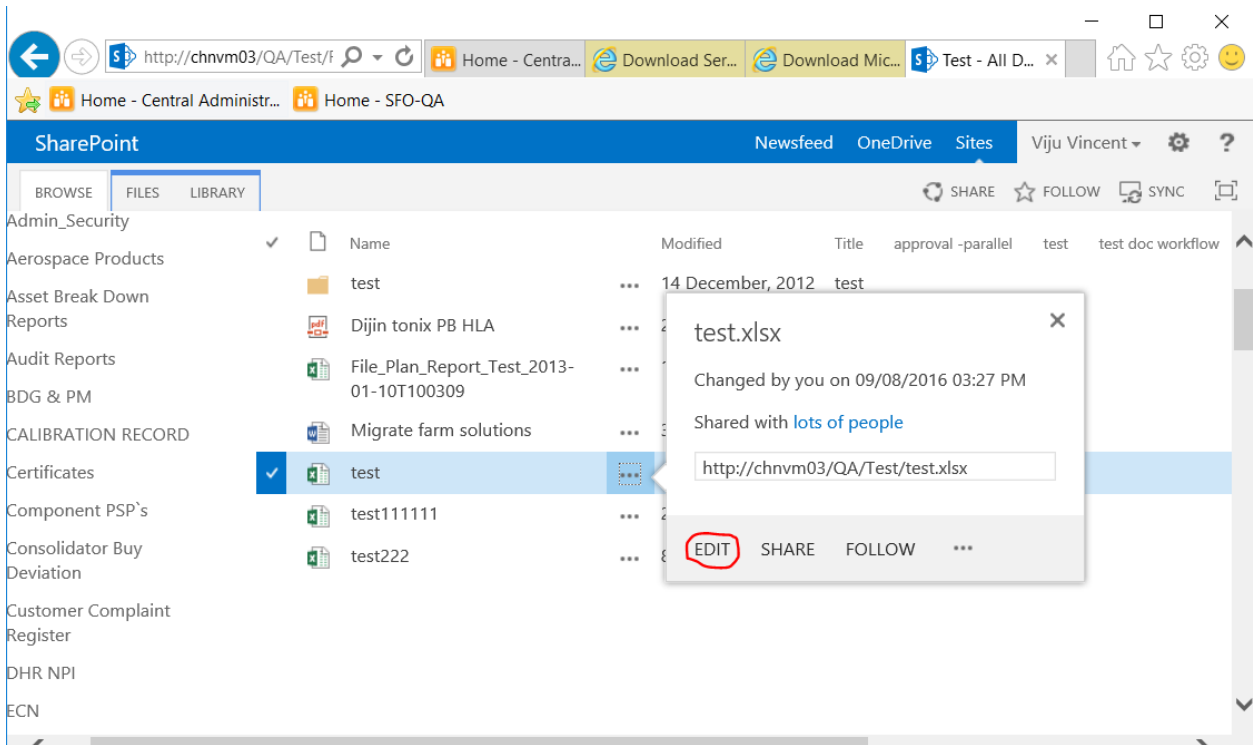
You (the checked-out user) can edit and save the changes of the document.



B) Edit document

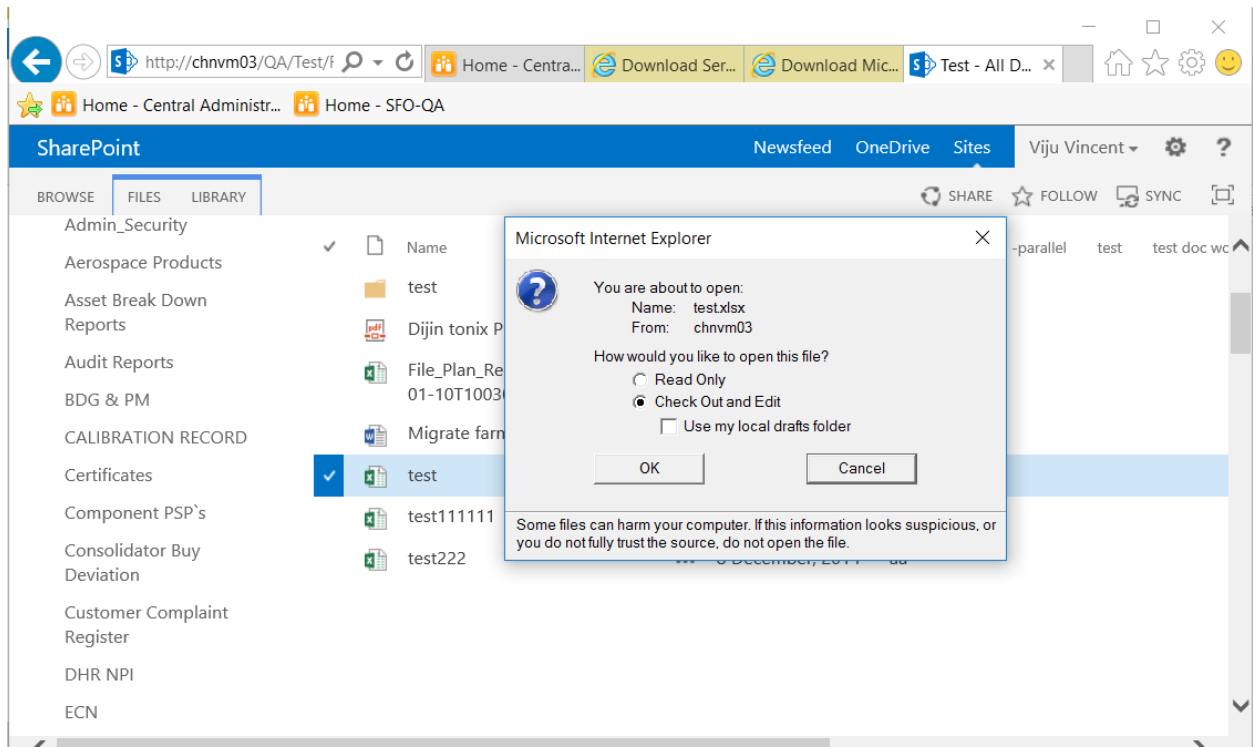
Method1

Select document and click Open Menu (...) and



Method2

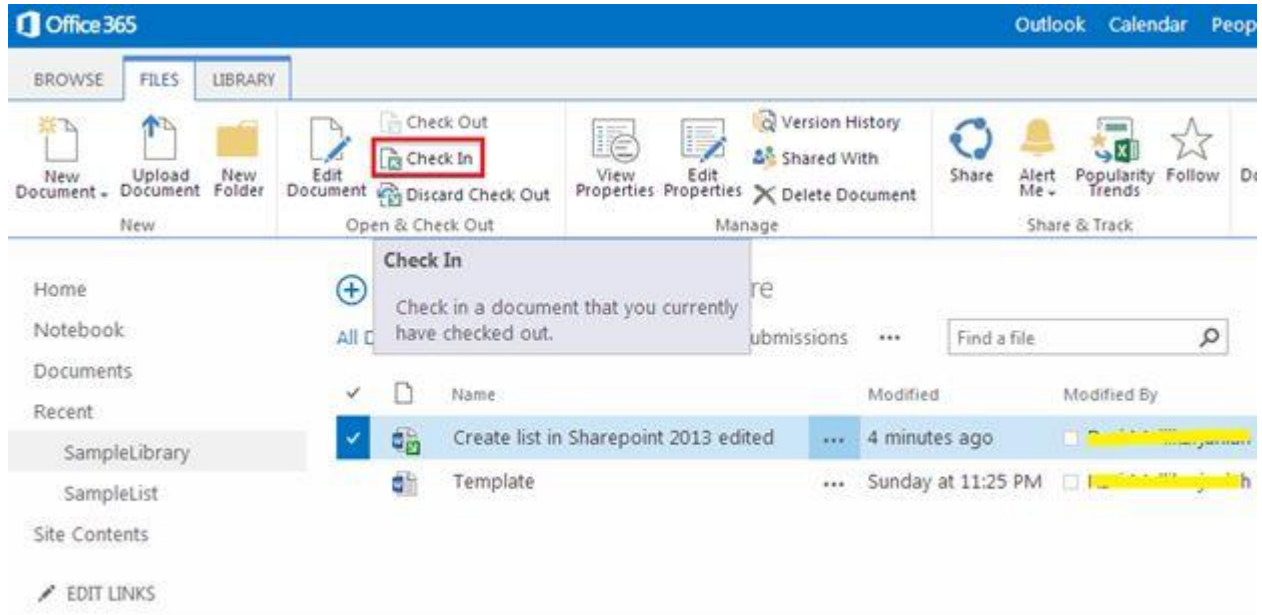
If a document is not checked out, select document and click Check Out and Edit



C) Check-in a file after a document content is edited

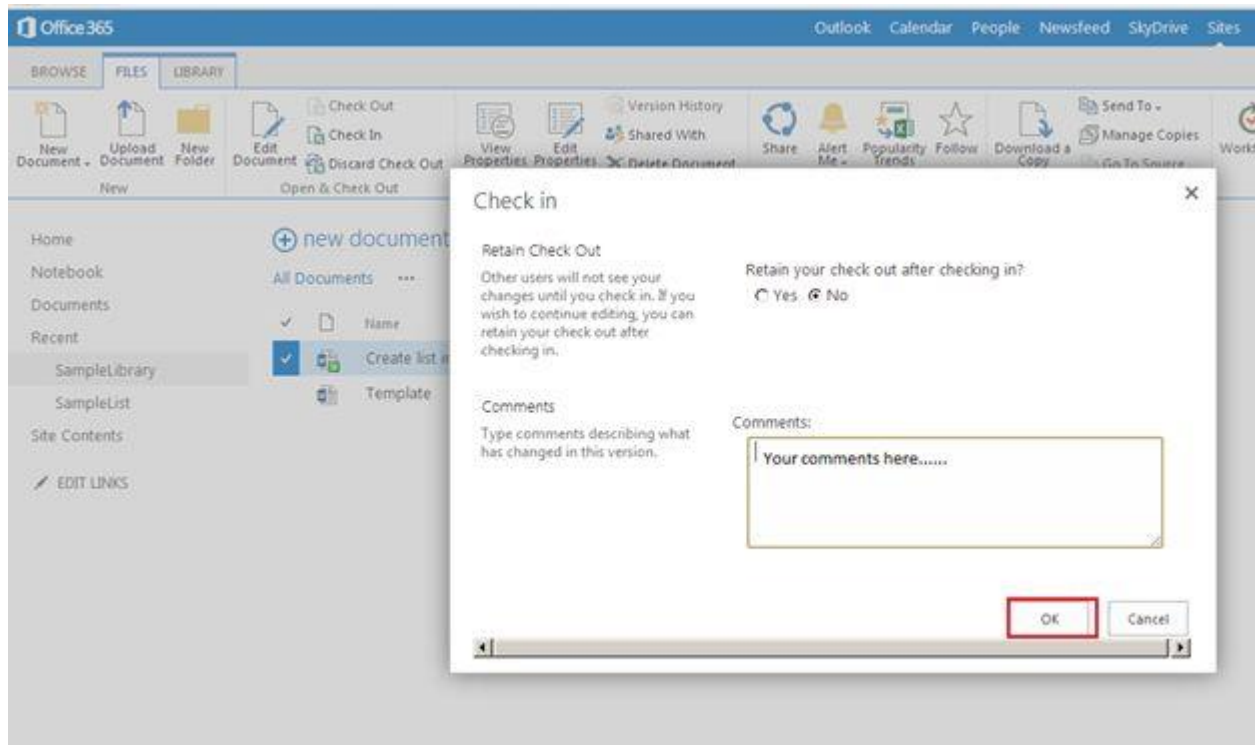
Step 1: Then you can check-in the edited file as shown below:

- Select the checked-out file
- Click on the files on the top ribbon bar
- Then select the check-in option on the top ribbon bar

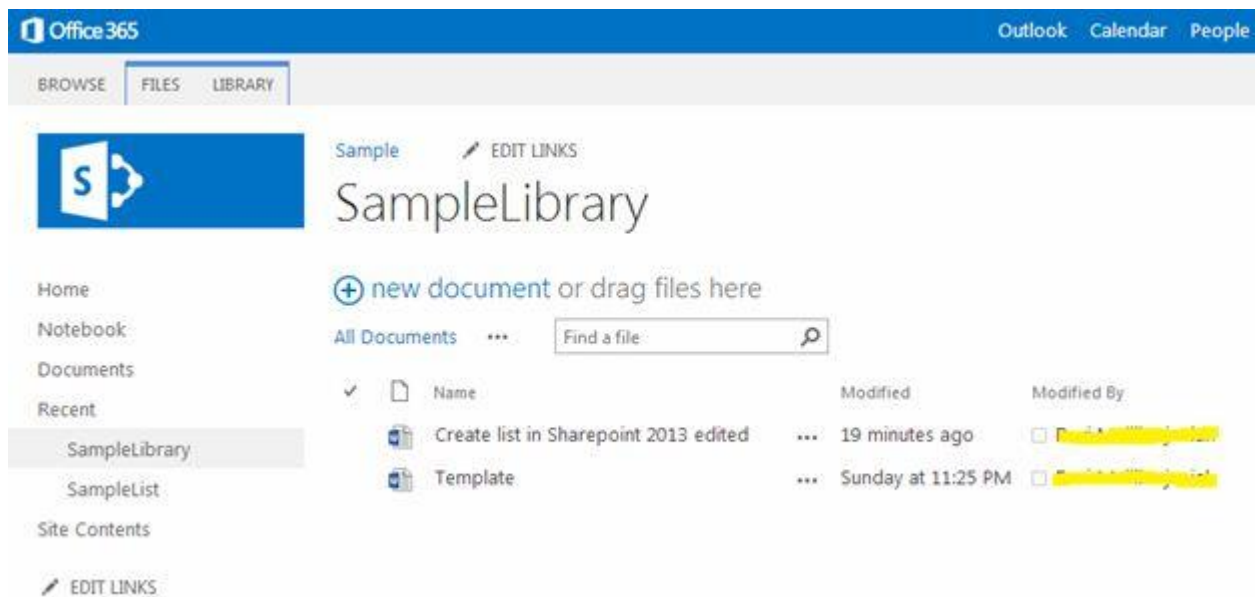


Step 2: When you select the check-in option in the top ribbon bar, you will get the pop-up as shown below,

Provide your comments and then select "Ok" to check-in the document.



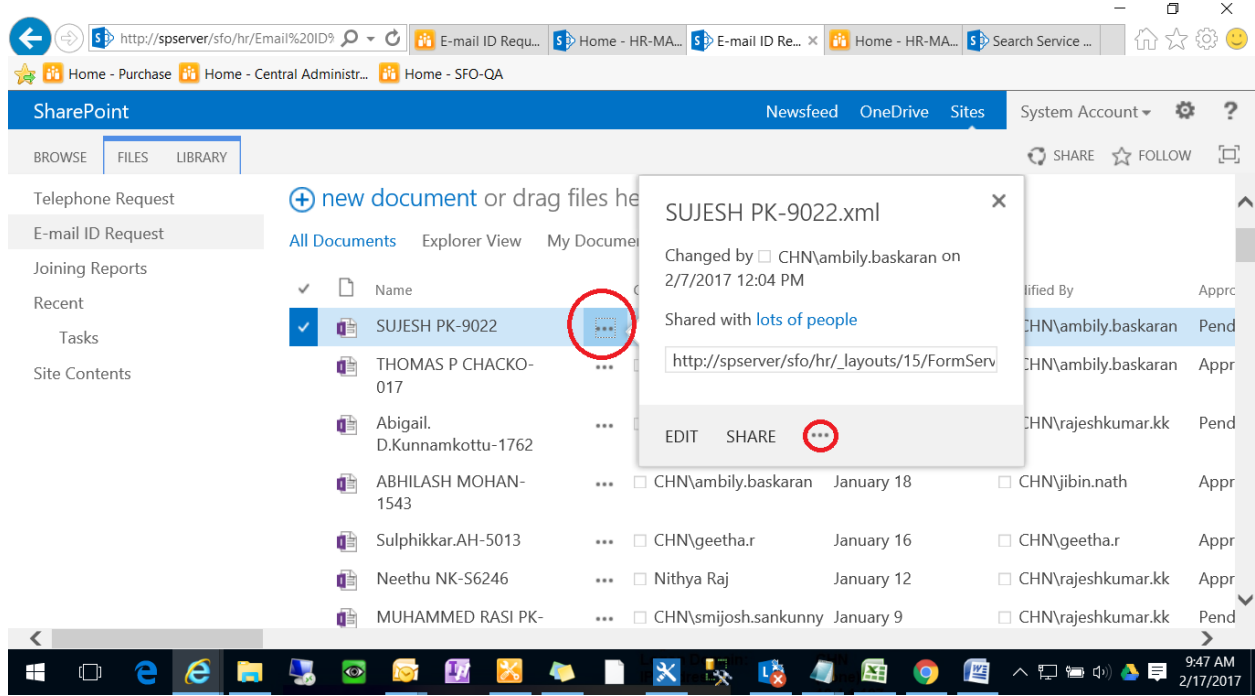
The document will be checked- in successfully.



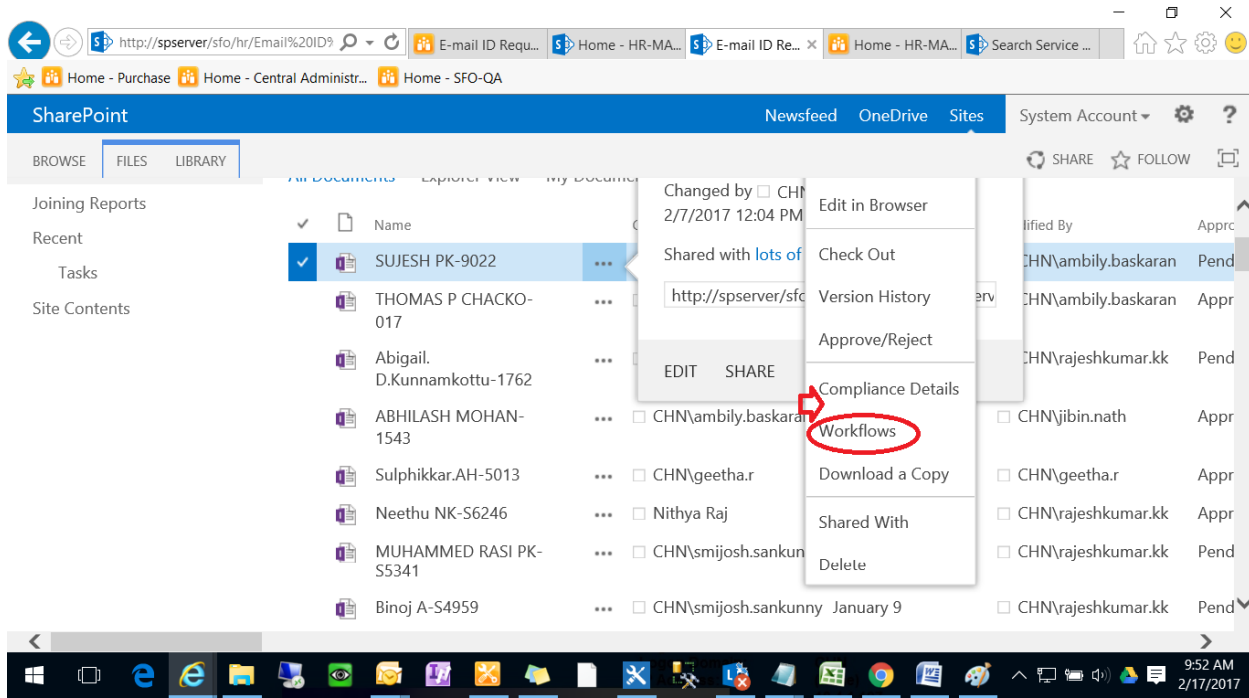
4. Workflows

Start a Workflow

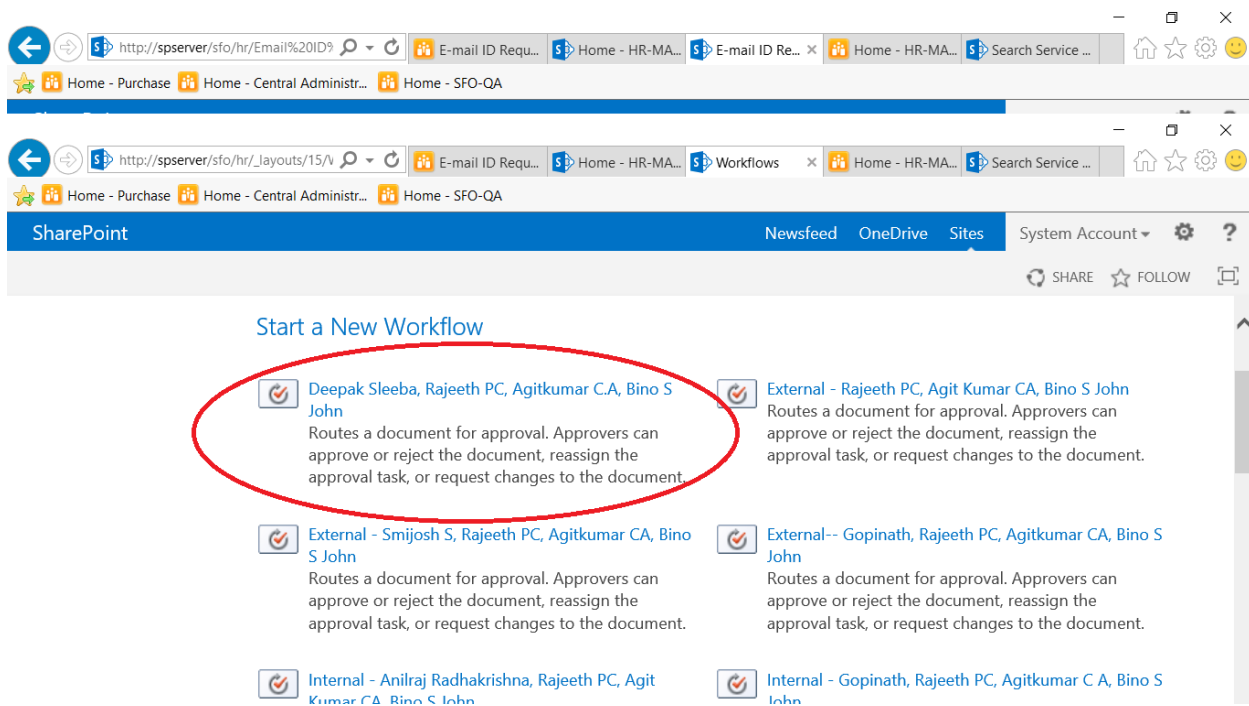
Step1: Select document and click Open Menu (...)



Step2: Click Workflows link to view workflows



Step3: click Workflow link and click **Start** button to start a workflow



Request	<input type="text"/>
	This message will be sent to the people assigned tasks.
Due Date for All Tasks	<input type="text"/>
	The date by which all tasks are due.
Duration Per Task	<input type="text"/>
	The amount of time until a task is due. Choose the units by using the Duration Units.
Duration Units	Day(s)
	Define the units of time used by the Duration Per Task.
CC	<input type="text"/>
	Notify these people when the workflow starts and ends without assigning tasks to them.
<input type="button" value="Start"/> <input type="button" value="Cancel"/>	



Approve workflow task

Method1: Approve workflow task through email

Step1: Click Approve/Reject link to open task approval page

The screenshot shows an Outlook email window titled "Tasks - Please approve BL mech- workflow details - Message (HTML)". The ribbon includes "File", "Message", and "Tell me what you want to do...". The ribbon buttons are: Ignore, Delete, Reply, Reply All, Forward, Meeting, More, Move to?, To Manager, Done, Create New, Reply & Delete, Move, Rules, Actions, Open this Task, Mark Unread, Categorize, Follow Up. The email content shows a message from SFOTech -Mechanical <helpdesk.cochin@nestgroup.net> to Viju Vincent, dated Sun 08-04-2019 12:13. The subject is "Tasks - Please approve BL mech- workflow details".

Task assigned by Sheefer K. S on 8/4/2019.

BLR Approval Workflow started by Sheefer K. S on 8/4/2019 12:11 PM
Comment:

Approved by Sheefer K. S on 8/4/2019 12:13 PM
Comment:

Click here to -->> [Approve/Reject](#)



Step2: Click Approve or Reject button.



HOME

Default Site

Tasks: Please approve BL mech- workflow details

Delete Item

This workflow task applies to [BL mech- workflow details](#).

Status	Not Started
Requested By	Sheefer, K. S.
Consolidated Comments	BLR Approval Workflow started by Sheefer, K. S. on 8/4/2019 12:11 PM Comment: These are the comments of the requestor and all previous participants.
Due Date	
Comments	
This message will be included in your response.	
Approve	Reject
Cancel	Request Change
Reassign Task	

Method2: Approve workflow task on SharePoint site

Step1: Open SharePoint site home page and locate **User Pending Tasks** and click task name to open approval page

The screenshot shows a SharePoint site for 'SFOTech - Mechanical'. The 'User Pending Tasks' section contains a table with the following data:

Type	Task	Item Link	Due Date
	Please approve BL mech- workflow details	BL mech- workflow details	

A red arrow points to the task name 'Please approve BL mech- workflow details'. Below the table is a 'Welcome to the SFO MECH Document Center' message.

Step2: Click Approve or Reject button.



Tasks: Please approve BL mech- workflow details

Search this site

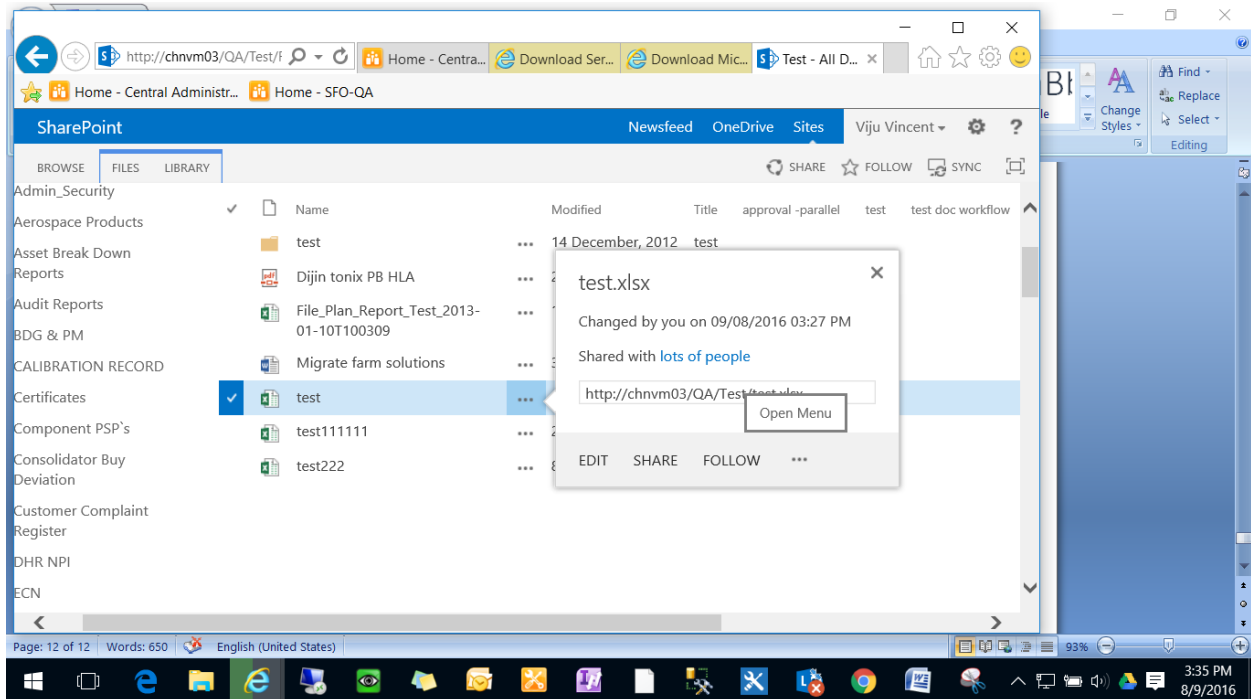
✕ Delete Item

✔ This workflow task applies to [BL mech- workflow details](#).

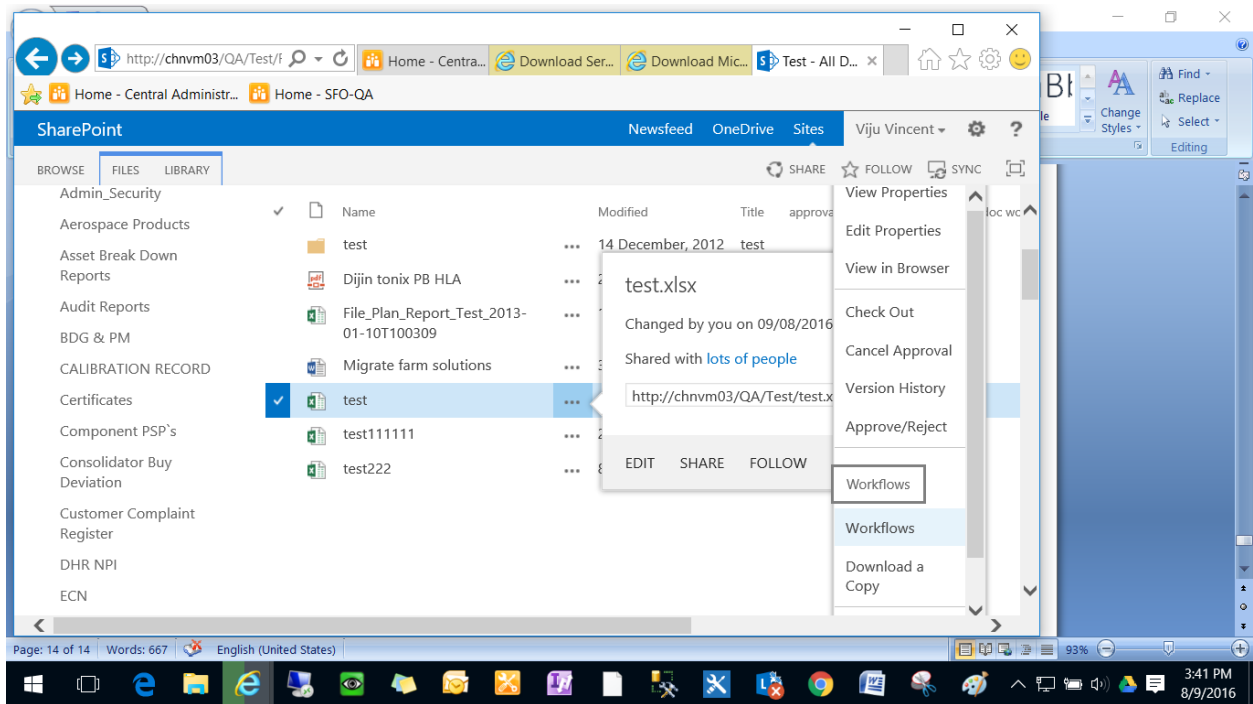
Status	Not Started
Requested By	Sheefer K. S.
Consolidated Comments	BLR Approval Workflow started by Sheefer K. S on 8/4/2019 12:11 PM Comment: These are the comments of the requestor and all previous participants.
Due Date	
Comments	
This message will be included in your response.	
Approve	Reject
Cancel	Request Change
Reassign Task	

View Workflow Status

Step1: Select document and click Open Menu (...)

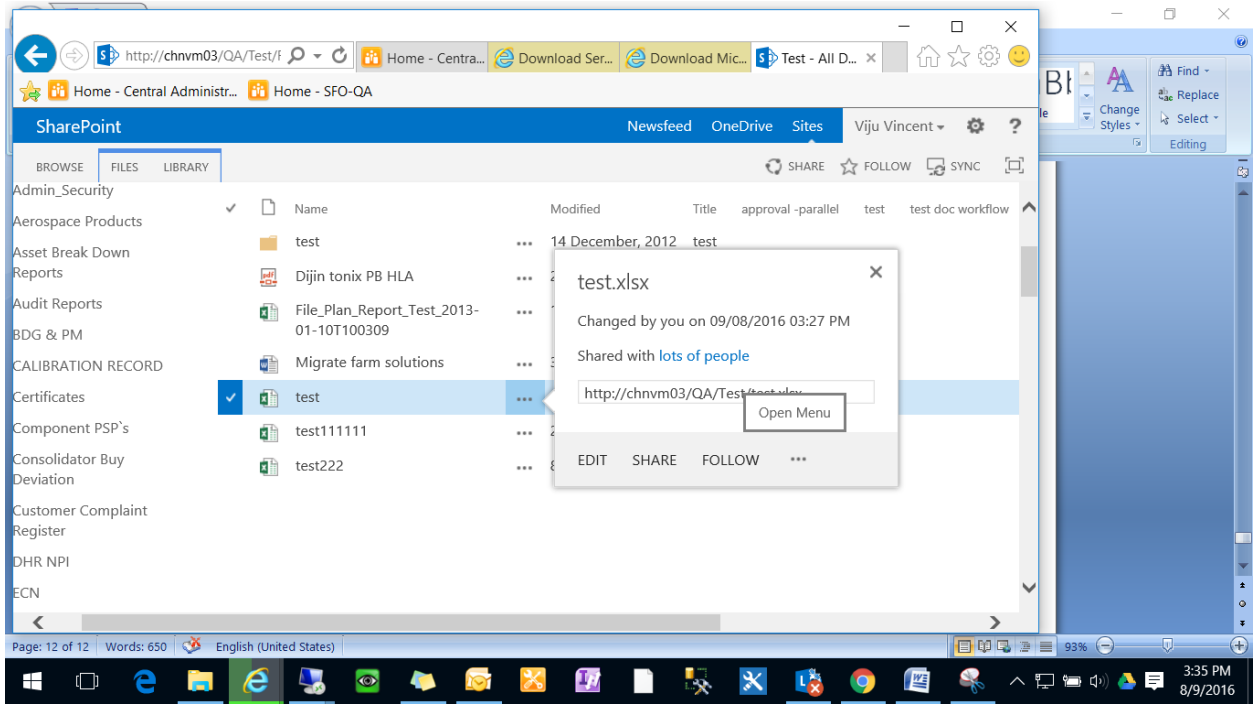


Step2: Click Workflows to view all workflows



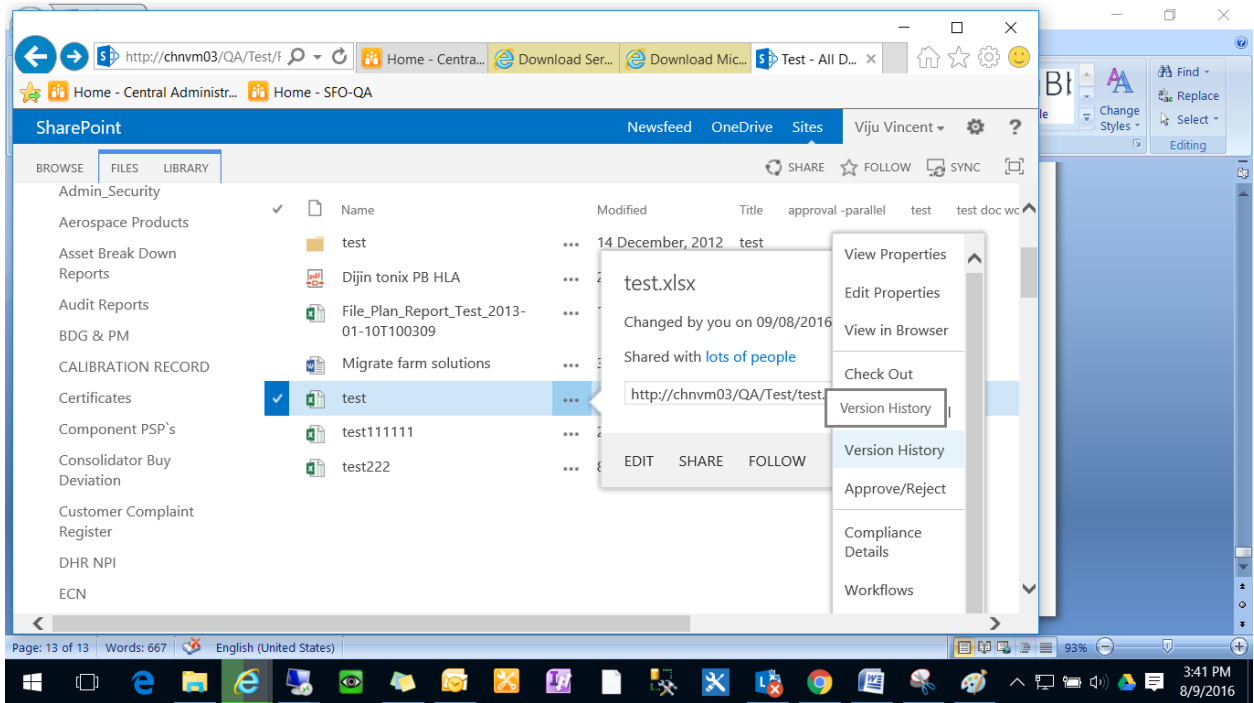
5. View version history

Step1: Select document and click Open Menu (...)



Step3

Click Version History to view all versions

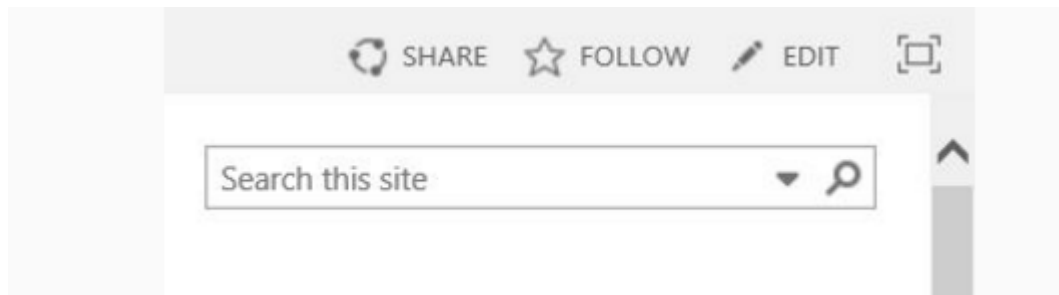


6. Search

Option 1: Site search box

Every site has this search box in the upper right hand corner, which allows you to surface up content based on what you have typed in.

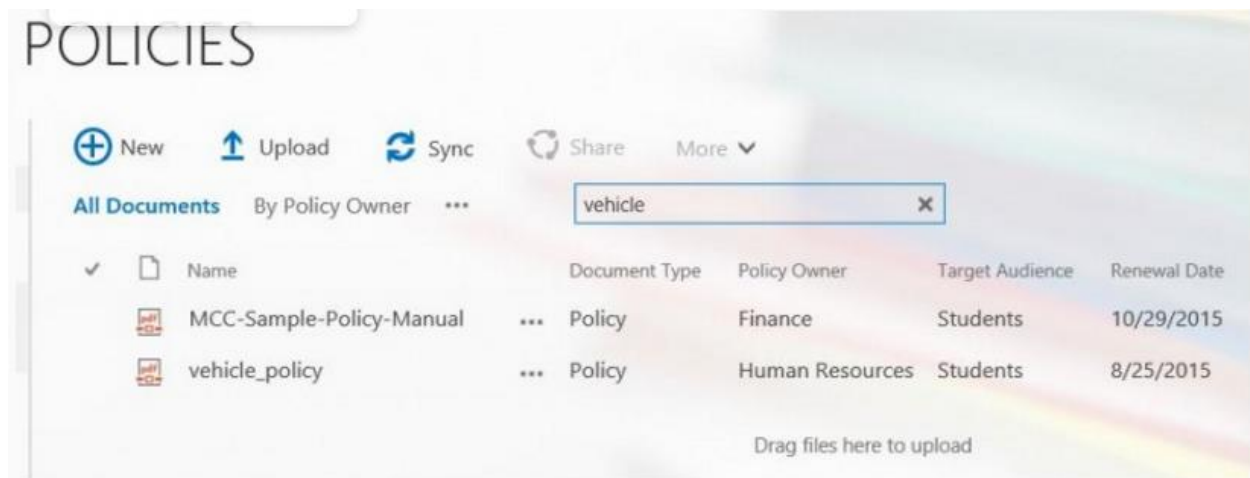
1. Navigate to the Search Box in the upper-right hand corner of your SharePoint Site
2. Type the text/keyword you are looking for
3. Hit **Enter**



Option 2: Document Library Search Box

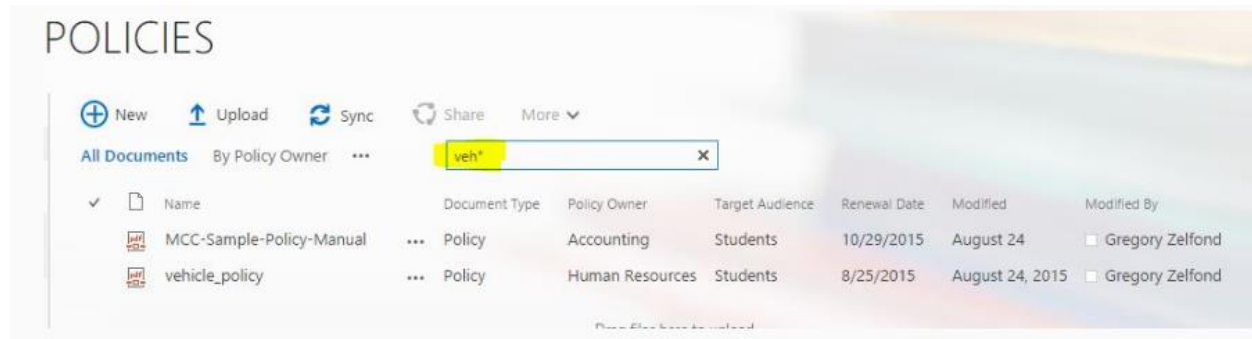
Every Document Library in SharePoint 2013 has a search box located just above the documents themselves. It allows you to search for documents just within the specific document library.

4. Navigate to the root of the Document Library
5. You will notice a search window present in the header portion of the document library (to the right of where all the views are)
6. Type the text/keyword you are looking for
7. Hit **Enter**



Option 3: Wildcard Search

Another cool search feature you can use with both Options 1 & 2 is wild card search. That is when you don't know exact keywords, only a portion of the text you are looking for (i.e. first few letters)



For wildcard to work in SharePoint...

- You have to start with the **first few letter of the word**. In other words, in a word “vehicle”, you can’t search for text “ehic”, it has to be “veh”
- The wildcard character in SharePoint is “*”. You have to put the asterisk (wildcard character) **after** the first few letters, not before. For example, **veh***, not ***veh**
- You can use SharePoint wildcard search **with both Options (global search and library-level search)**

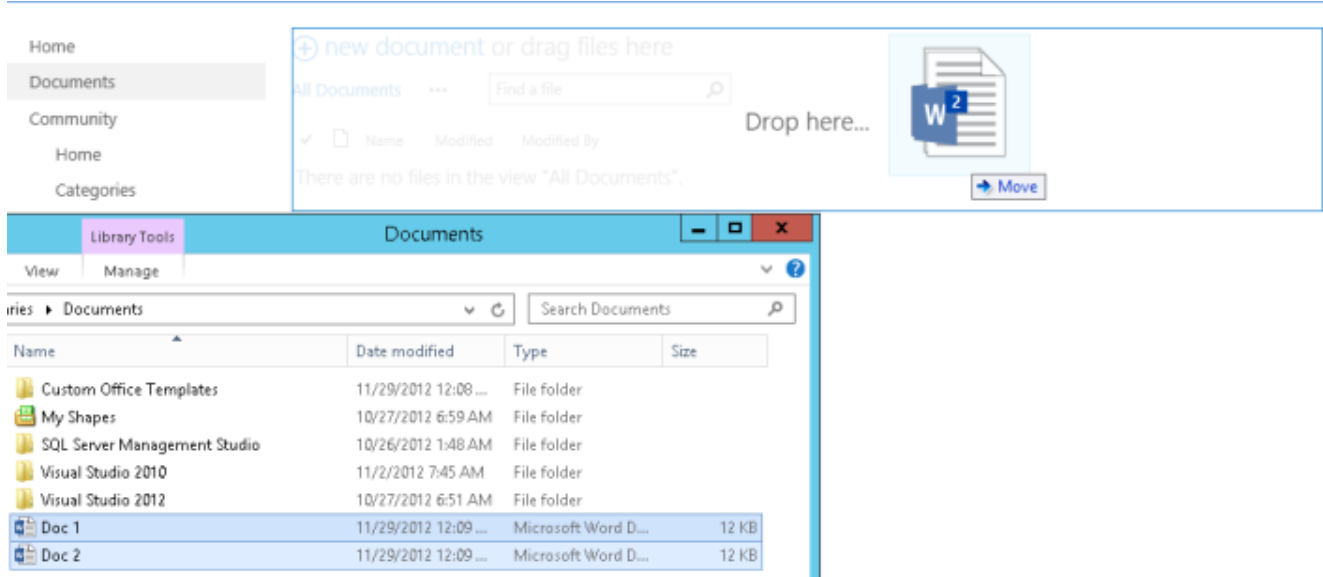
7. Upload multiple documents in SP 2013

In SharePoint 2013 the “Upload Multiple” Options has been depreciated. There are two alternative ways to Upload multiple documents

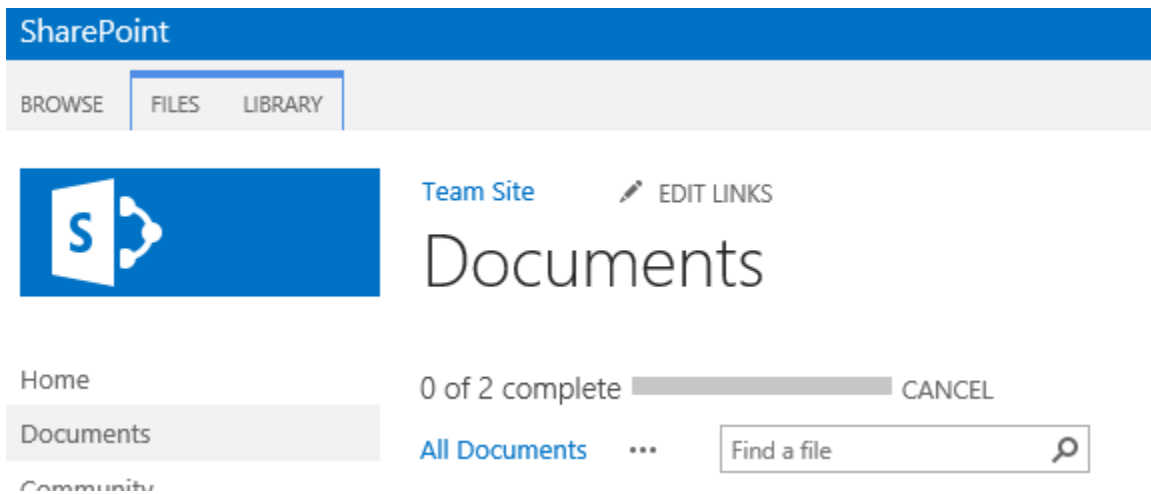
Option 1 – Using the drag-and-drop functionality

On any document library you can now simply Drag and Drop the document and it will be upload with a quick progress bar. Here is how this feature works

Simply select multiple documents from local and drag it onto the document library. The window will change to “Drop here...”



You can see the Upload documents Status bar next at the Document Libraries title.



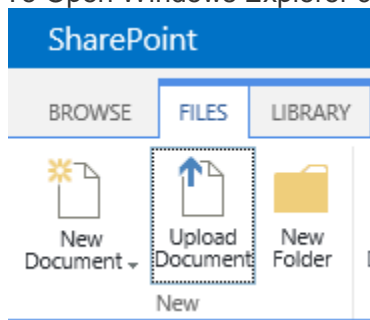
You would see Upload Complete once the upload completes.

Know Issues with Drag and Drop –

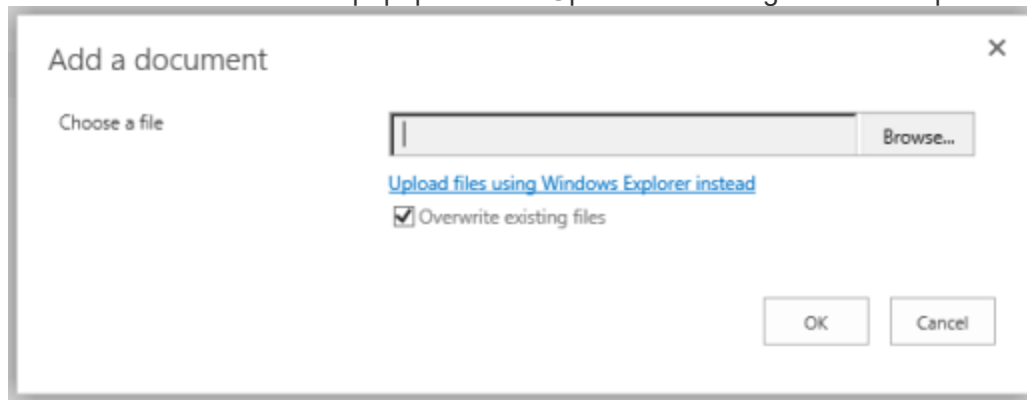
Feature will not work with the IE version Internet Explorer version 8.0.6001.18702IC

Option 2 – Windows Explorer view

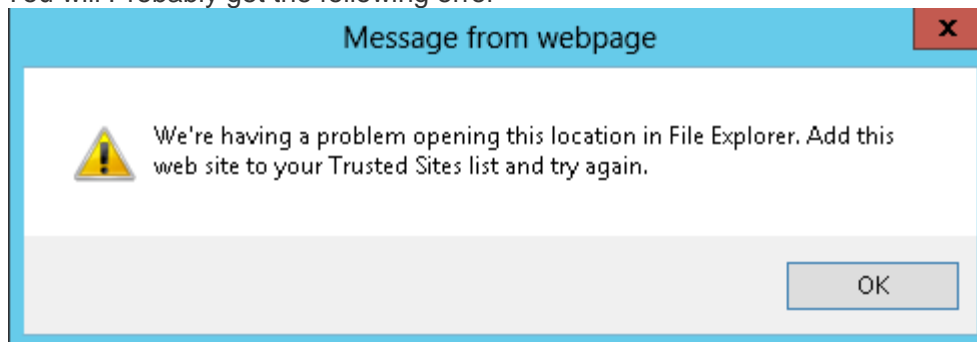
To Open Windows Explorer click on Upload Document button as shown in picture below



Next in the Add Documents popup click on “Upload Files using windows Explorer Instead”



You will Probably get the following error



To resolve this add the SharePoint site as Trusted in your Browser and Make sure that the WebClient service is running. To do this, follow these steps:

Click Start, click Run, type services.msc, and then press Enter.

In the list of services, locate the WebClient service, and then make sure that its status in the Status column is set to Started. If its status is not set to Started, double-click WebClient, click Start, and then click OK.

Once done restart the browser and try opening the Windows Explorer again. In the Windows Explorer you can copy and paste multiple documents as done in earlier SharePoint versions.

