

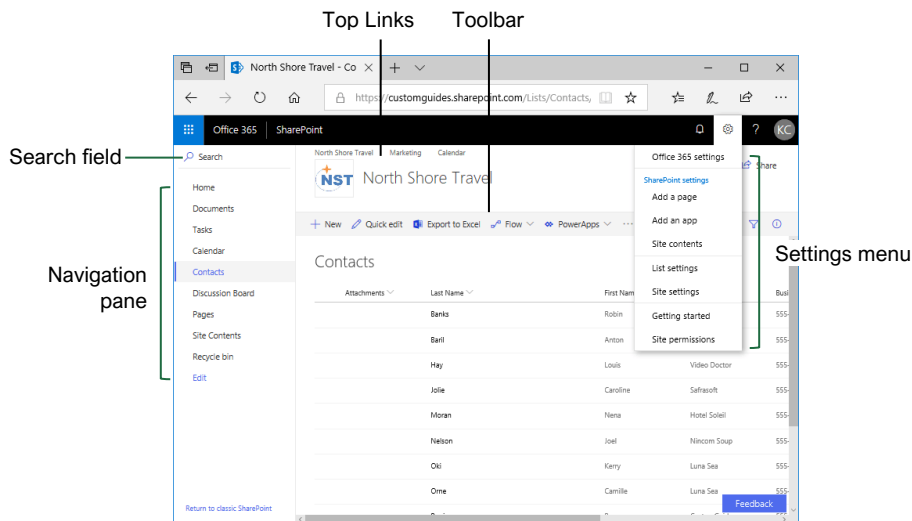


Microsoft®

# SharePoint 2016

## Quick Reference Guide

## The SharePoint 2016 Screen



## List and Library Types

### Types of Lists

**Announcements:** Shares news and status updates.

**Contacts:** Stores information about people, such as names, company, phone numbers, and email addresses.

**Discussion Boards:** Contain discussion threads, with an option to store email discussions as well.

**Links:** Stores a list of links to websites, both external websites and internal SharePoint sites.

**Calendar:** Stores events, meetings, and other dates in a special list that can be viewed as a calendar. Calendar lists can also integrate with Outlook.

**Tasks:** Tracks information about projects, including who is assigned to each task, that task's progress, and due dates. Task lists are also able to integrate into Outlook.

**Survey:** Contains a list of questions to have people fill out.

**Custom List:** This type of list allows you to create it from scratch, adding just the columns that you need.

### Types of Libraries

**Asset Library:** Stores media assets like images, video, and audio files. An asset library also stores thumbnails and metadata for media assets to make them easier to use.

**Document Library:** Stores many kinds of documents, including text documents, spreadsheets, and presentations.

**Form Library:** Stores XML-based data entry forms.

**Picture Library:** Stores pictures, while also offering several ways to view and edit the pictures in the library.

**Report Library:** Contains web pages and documents to track data reports and dashboards.

**Wiki Page Library:** Lets you create interconnected Wiki pages that can be easily created and modified by multiple users.

## The Fundamentals

**Access a SharePoint Site:** Enter the address for your SharePoint site into your browser, enter your username and password, then click **OK** (for on-premises instances), or open the SharePoint app on Office.com (for instances of SharePoint Online).

**Navigate a SharePoint Site:** Use the links at the top of the page, and in the Quick Launch area on the left side of the page, to visit pages and subsites.

**Use the Ribbon:** Click a ribbon tab to display its commands, then click a button on the ribbon. Click the **Browse** tab to close the ribbon.

**Search a Site:** Click in the **Search** field, enter search keywords, and press **Enter**.

**Get Help:** Click the **? Help** icon in the upper right, enter a search topic in the **Search** box, then click a relevant article's title.

**Delete an Item:** Select an item in a library or list, click the **Delete** button on the toolbar (or on the ribbon), and click **Delete** again to confirm.

**Delete a List or Library:** Open the Site Contents page, click the **Show actions** button next to a list or library, and select **Remove**. Click **Delete** to confirm.

## Use Lists and Libraries

**Create a List:** Click the **Settings** icon in the upper right, select **Add an app**, click a type of list, give it a name, and click **Create**.

**Add a List Item:** Open a list, click the **+ New** button, fill out the available fields, then click the **Save** button.

**Use Quick Edit:** Click the **Quick Edit** button, fill out the columns and rows to add list items, then click the **Exit Quick Edit** button.

**Edit a List Item:** Check a check box next to a list item to select it, click the **Edit** button, make changes to the item data, then click the **Save** button.

**Delete a List Item:** Check a checkbox next to a list item to select it, click the **Delete** button, and click **Delete** again to confirm.

**Add a New List Column:** While viewing a list, click the **+ Add column** button at the right edge of the list. Select a column type, fill out that column's details, then click **Save**.

**Edit a Column:** Click the column's list arrow, select **Column Settings**, and select **Edit**. Modify that column's details, then click **Save**.


## Use Lists and Libraries

**Create a Library:** Click the  **Settings** icon in the upper right, select **Add an app**, click a type of library, give it a name, and click **Create**.


**Create a Document in a Library:** Open the library, click the **+ New** button, and select a type of document.


**Upload a File:** Open the library, click the **↑ Upload** button, select **Files** or **Folder**, select files or a folder to upload, then click **Open**.


**Sort a List or Library:** Click a column header, then select a sorting option.

**Filter a List or Library:** Click the  **Filter** button and check the check boxes for the filters you want to apply.

**Clear a Filter:** Click the  **Clear Filters** button in the Filters pane.

**Change Views:** Click the  **View Options** button (which will be labeled with the name of the current view) on the toolbar and select a view.


**Create a Custom View:** Click the  **Settings** icon, select **List Settings**, and click **Create View**. Select a view type, give the view a name, configure the view's settings, then click **OK**.



**Edit a View:** Click the  **View Options** button on the toolbar, select **Edit Current View**, make changes to the view, and click **OK**.



## Work with Documents



**Open a File in the Browser:** Click a file's name.



**Open a File in Office:** Select a file by checking its check box, click the **Open** button, and select **Open in [Office Program]**.

**Download a File:** Select a file, then click the  **Download** button on the toolbar.

**Check Out a File:** Select a file, expand the toolbar by clicking the  **ellipsis** button (if necessary), and click the  **Check out** button.



**Check In a File:** Select a file, expand the toolbar by clicking the  **ellipsis** button (if necessary), and click the  **Check in** button. If necessary, enter details for the check-in and click **OK**.


**View a File's Version History:** Select a file, expand the toolbar by clicking the  **ellipsis** button (if necessary), and click the  **Version history** button.

**Create an Alert:** Select a file, expand the toolbar by clicking the  **ellipsis** button (if necessary), and click the  **Alert me** button. Configure the alert's settings, then click **OK**.


## Work with Documents

**Create a Folder:** Click the **+ New** button, select **Folder**, enter a name for the folder, and click **Create**.



**Move a File to a Folder:** Click and drag a file into a folder. Or, select a file, expand the toolbar by clicking the  **ellipsis** button (if necessary), click the  **Move To** button. Select a library and folder, then click **Move Here**.

**Share a File:** Select a file, click the  **Share** button, enter names or email addresses, select permissions, add a message, and click **Send**.


## Work with Web Pages

**Create a New Page:** From the SharePoint home page, click the **+ New** button and select **Page**. Enter a name in the Title field, then add content. Click the  **Save and close** button.



**View Site Pages:** Click the  **Settings** icon in the upper right, select **Site Contents**, then click the **Site Pages** library.


**Edit a Page:** Open a page, then click the  **Edit** button on the toolbar. Add, edit, or remove content, then click the  **Save and close** button.

**Publish a Page:** While viewing a page you've created, click the  **Publish** button on the toolbar.


**Promote a Page:** While viewing a page, click the  **Promote** button in the toolbar, then select a promotion option from the pane.

- **Add Page to Navigation** will add a link to the page to the Navigation pane at the left.
- **Post the Page as News** will add a link and preview of the page to the site's home page, as well as the newsfeed of the site's users.
- **Email** will send an email containing a link to the page to a list of recipients.
- **Copy Address** will copy the page's URL to your clipboard to share in other ways.

**Rename a Page:** Select a page in the **Site Pages** library, expand the toolbar by clicking the  **ellipsis** button (if necessary), click the  **Rename** button, enter a new name, then click **Save**.

**Delete a Page:** Select a page in the **Site Pages** library, click the  **Delete** button on the toolbar, then click **Delete** to confirm.

## Manage Sites and Subsites

**View Site Contents:** Click the  **Settings** icon in the upper right and select **Site Contents**.


**Access Site Settings:** From the Site Contents page, click the **Site Settings** link.


## Manage Sites and Subsites


**Create a Subsite:** From the Site Contents page, click the **+ New** button and select **Subsite**. Give the subsite a name, description, and

## Manage Sites and Subsites


address. Select a site template, permissions, and navigation options, then click the **Create** button.

**View a Subsite's Users:** While viewing a subsite, click the  **Settings** icon in the upper right and select **Site Permissions**.


**Add Users to a Group:** While viewing a site or subsite, click the  **Settings** icon in the upper right, select **Site Permissions**, and click the **Advanced permissions settings** link. Click a group, click the **New** button, and select **Add Users**. Enter names or email addresses, add a message, and click the **Share** button.


**Remove Users from a Group:** While viewing a site or subsite, click the  **Settings** icon in the upper right, select **Site Permissions**, and click the **Advanced permissions settings** link. Click a group, select a user by checking its check box, click the **Actions** button, select **Remove Users from Group**, then click **OK**.

## Manage Tasks and Events

**Add a Task:** While viewing a Task list, click  **New Task**. Give the task a name, start and end date, then click **Save**.


**Edit a Task List:** While viewing a Task list, click **Edit**. Modify a task's details, then click **Stop**.


**Add a Task to the Timeline:** Click a task's  **ellipsis** button and select **Add to Timeline**.

**Add a Calendar Event:** While viewing a SharePoint calendar, click the **Events** tab, click the **New Event**  button, enter an event's details, then click **Save**.

## Use SharePoint with Office

**Add a SharePoint Library to Office:** From an Office app, click the **File** tab, select **Save As**, click **Add a Place**, and select **Office 365 SharePoint**. Enter your email address, click **Next**, enter your password, and click **Sign In**.

**Connect a Calendar to Outlook:** Open a calendar, click the **Calendar** tab on the ribbon, click the  **Connect to Outlook** button, and click **Yes**. When Outlook asks if you want to add the calendar, click **Yes**.

**Export a List from SharePoint to Excel:** Open a list in SharePoint, click the  **Export to Excel** button on the toolbar, and click **Save**. Open the downloaded file, then when asked about opening a data connection to SharePoint, click **Enable**. Choose how to import the table, then click **OK**.



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