Microsoft
SharePoint
Reference Sheet

connect
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What is SharePoint?

Microsoft SharePoint 2013 takes advantage of the best of the web to help you be more productive at work. With SharePoint 2013, you can manage and search documents, publish reports and business information, track contacts, display information from other databases, and collaborate using blogs, wikis, and discussion boards. You can use SharePoint's websites to store, track, secure, and share all the stuff you do at work.

The Fundamentals

- **To Upload a Document:** Click the Upload button, find the document you want to upload then click Open or you can click and drag the document into the document section in your Team Site.
- **Create a New Document:** Click the New button and select the type of document you want to create (Word document, Excel workbook, PowerPoint presentation, OneNote notebook, Excel survey).
- **Create a New Folder:** click the New button and select the New folder, then name your folder and click Save.
- **To Open a Document/Folder:** Click directly on the document or folder name.
- **To Delete a Document/Folder:** Click on the document or folder, then click the Manage button, and select Delete.
- **To Preview a Document:** Right click next to the document name.
- **To Download a Copy of a Document:** Right click on the document, then click the three dots, and finally select Download a Copy.
- **To Follow a Folder:** Right click on the document or folder, then click the three dots, and lastly select Follow.
- **To Follow a Document:** Right click next to the document name, then select Follow.

Public Site

Is a place on SharePoint where you can create and publish a website for your company through SharePoint and Office 365.

Public site

Team Site

Is a private web space, where people have permissions to participate in that team site are allowed to access documents that are in that site. They can also edit those documents and add documents as well. It is a collaboration space for team members.

Team Site

Nemsys LLC : 122 S. St Clair, Toledo, Ohio 43604 : 419-243-3603 : www.nemsys.com

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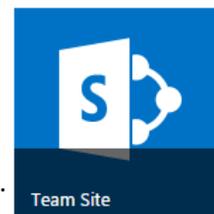
To Share a Document or Folder

- **To Share a Document/Folder:** Click on the document or folder, then click the Manage button, select Share With or you can right click next to the document name, then click Share, or you can click on the document or folder, then click Share.
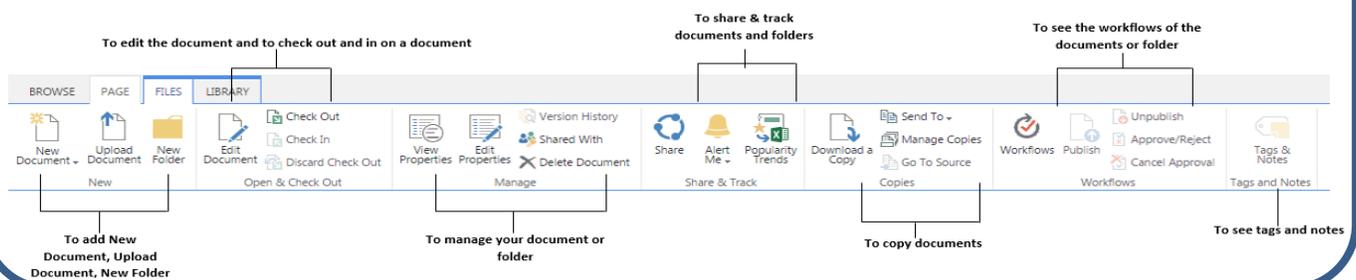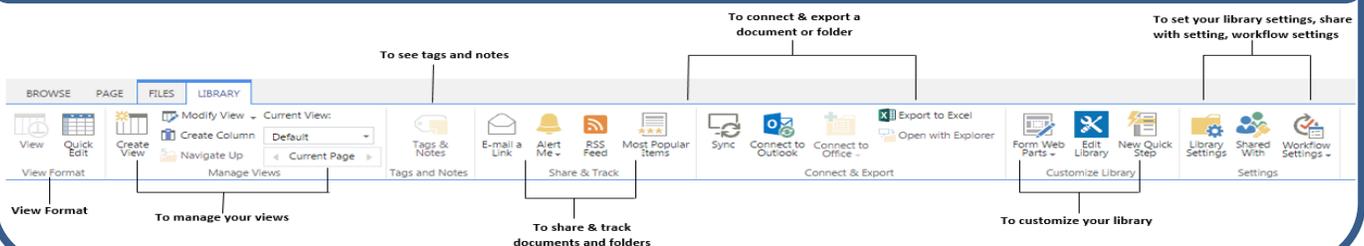
  A box will appear where you can invite people to share the document or folder, or you can get a link to email out to people who you want to share the document or folder with.
- **Invite People:** Enter the names, email addresses, or type "Everyone" who you want to share the document or folder with.
- **Get a Link:** Create a link that can you email out to people you want to share the document or folder with. You can either create a link to allow people to only view and not edit it, or you can create a link that allows people to view and edit it.

- **To See Who the Document/Folder is Shared With:** Click on the document or folder, click the Share button, and then select Shared With.

SharePoint Files Tab

To edit the document and to check out and in on a document

To share & track documents and folders

To see the workflows of the documents or folder

BROWSE | PAGE | FILES | LIBRARY

New Document | Upload Document | New Folder | Edit Document | Check Out / Check In / Discard Check Out | View Properties | Edit Properties | Version History / Shared With / Delete Document | Share | Alert Me | Popularity Trends | Download a Copy | Send To / Manage Copies / Go To Source | Workflows | Publish | Unpublish / Approve/Reject / Cancel Approval | Tags & Notes

New | Open & Check Out | Manage | Share & Track | Copies | Workflows | Tags and Notes

To add New Document, Upload Document, New Folder

To manage your document or folder

To copy documents

To see tags and notes

SharePoint Library Tab

To see tags and notes

To connect & export a document or folder

To set your library settings, share with setting, workflow settings

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View | Quick Edit | Create View | Modify View / Create Column / Navigate Up | Current View: Default / Current Page | Tags & Notes | E-mail a Link | Alert Me | RSS Feed | Most Popular Items | Sync | Connect to Outlook | Connect to Office | Export to Excel / Open with Explorer | Form Web Parts | Edit Library | New Quick Step | Library Settings | Shared With | Workflow Settings

View Format | Manage Views | Tags and Notes | Share & Track | Connect & Export | Customize Library | Settings

View Format

To manage your views

To share & track documents and folders

To customize your library

SharePoint Page Tab

To manage your document and folder

Page actions

To see tags and notes

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Edit | Check Out | Edit Properties | Rename Page | Page History / Page Permissions / Delete Page | E-mail a Link | Alert Me | Popularity Trends | Make Homepage | Incoming Links | Library Settings | View All Pages | Tags & Notes

Edit | Manage | Share & Track | Page Actions | Page Library | Tags and Notes

To edit document and folder

To share & track documents and folders

Page Library

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