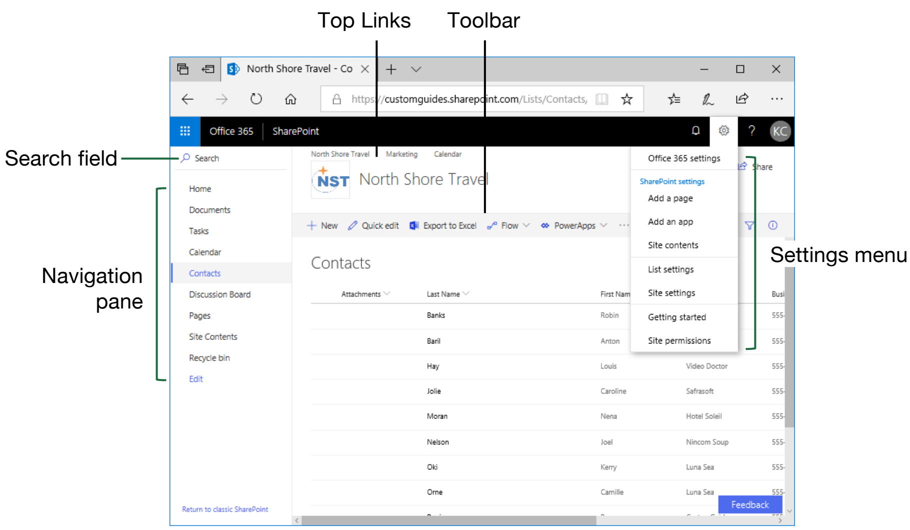
Microsoft®

SharePoint 2016

Quick Reference Card

TOBIN SOLUTIONS

The SharePoint 2016 Screen



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**.

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.

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 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**.