Tech Tips

SHAREPOINT ONLINE AND 2013 QUICK REFERENCE GUIDE

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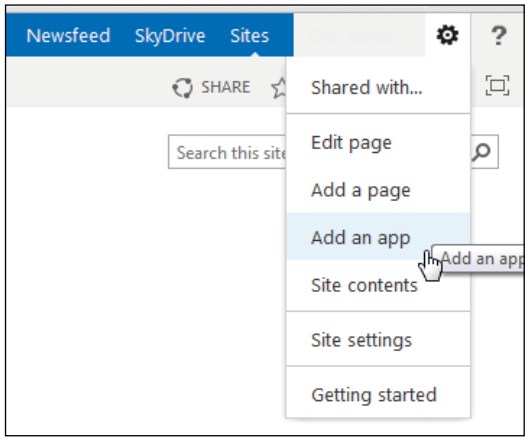
CREATE AND SET UP A LIST

A SharePoint list is a handy tool for sharing contacts, calendar appointments, tasks, or data with team members and site visitors, and provides the underlying structure for organizing information on your site. This course shows you how to create a list and set it up for your team to use.

CREATE A LIST

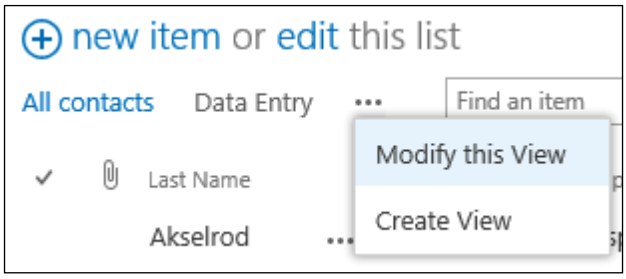
1. Click **Settings ⁞ Add an app**.



2. Search for the list app you want to use and then click the name of the app to create the list. For example, search for "contacts" and then click the Contacts app.
3. Type a name for the list in the **Name** box and then click **Create**.

ADD AN EXISTING COLUMN TO A VIEW OF THE LIST

1. At the top of the list, click the ellipses (**...**), and then click **Modify this View**.



Select the check box for the column you want to add and then click **OK**.

CREATE A NEW COLUMN

1. At the top of the list, click **edit**.

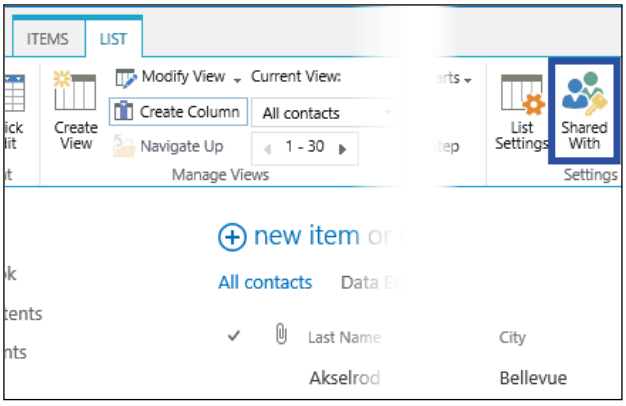
Click the plus sign (**+**), and then select the column type from the list that appears.

Reset the sorting, filter, and other options, and then click **Save**.

SHARE A LIST

You can share a list only if you created the list or the site. If you didn't create the list or site, you can email a link to the list instead.

1. Click **List ⁞ Shared With**.

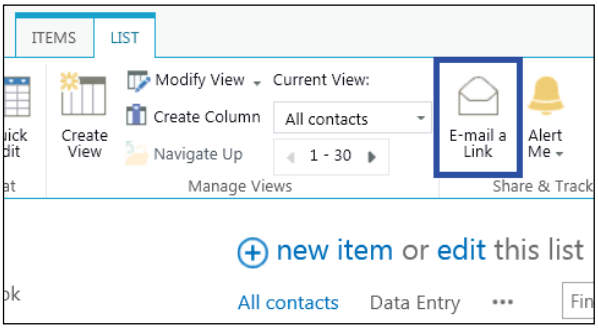


In the **Shared With** dialog box, click **INVITE PEOPLE**.

Type the names of the people you want to share the list with and then click **Share**.

EMAIL A LINK TO A LIST

1. Click **List ! E-mail a Link**.



Click **Allow** in the warning that pops up to allow your email program to open a new email message.

A new email message opens with a link to the list included. Add people to the **To** line, finish the message, and send it.

SET UP AN ALERT

1. Click **List ! Alert Me ! Set an alert** on this list.
2. On the **New Alert** page, change the title for the alert if you want.
3. In the **Send Alerts To** section, enter the user names or email addresses of people you want alerts to be sent to.
4. Set other options in the **Change Type**, **When to Send Alerts** and other sections, and then click **OK**.

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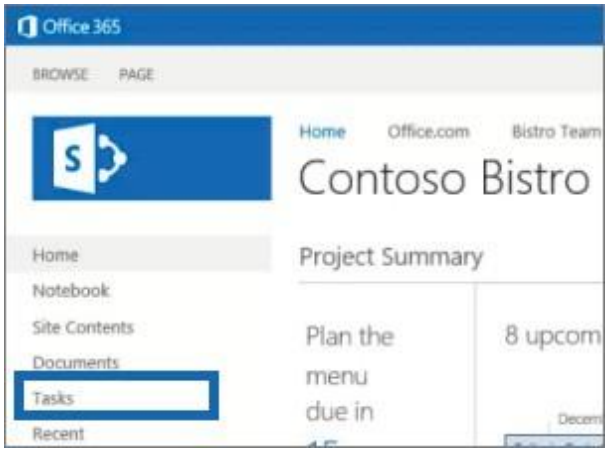
START USING A LIST

A list is a place on a SharePoint site where you can share information with other people in your company. This is where you can store and share contacts, calendar appointments, tasks, or other sorts of information you need to track.

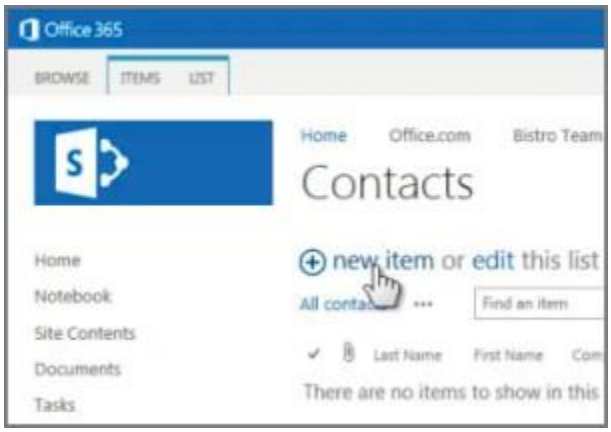
WHERE CAN I FIND A LIST?

1. On your team site, look for the name of the list in the navigation, or click **Settings** ⚙ ! **Site contents**.
2. Click the name of the list to open it.



ADD AN ITEM TO A LIST

1. In the list where you want to add an item, click **new item**.



Enter the information for the list item.

Click **Save**.

ADD OR EDIT MULTIPLE ITEMS IN A LIST

1. At the top of the list you want to edit, click **edit**.

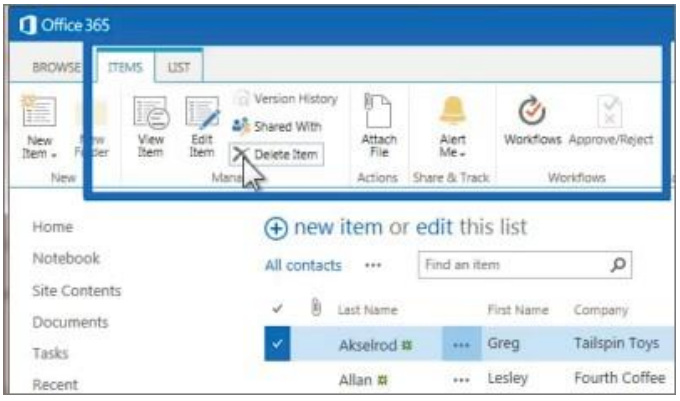
Type information in the boxes.

When you're finished editing, click **Stop editing**.

DELETE ITEMS IN A LIST

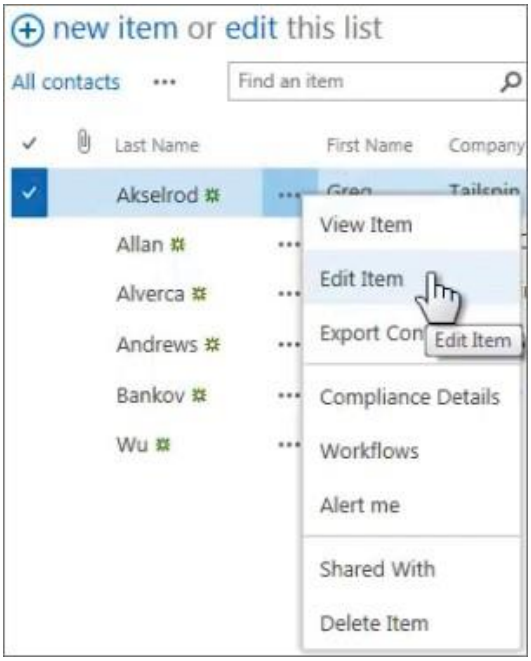
There are multiple ways to delete items in a list. Here's the quickest way:

1. Select the items you want to delete.
2. Click **Items ! Delete Item**.



EDIT ALL THE DETAILS IN A LIST ITEM

1. Select the item you want to edit, click the ellipses (**…**), and then click **Edit Item**.

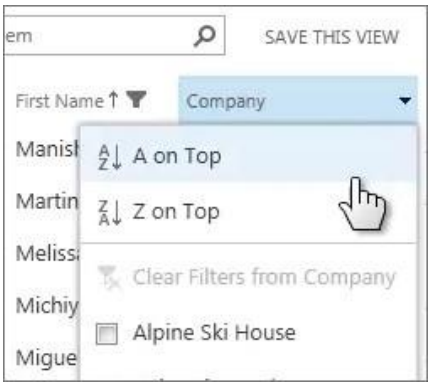


Edit the information in the form that appears.

When you're finished editing, click **Save**.

SORT OR FILTER A LIST BY COLUMN HEADING AND SAVE THE VIEW

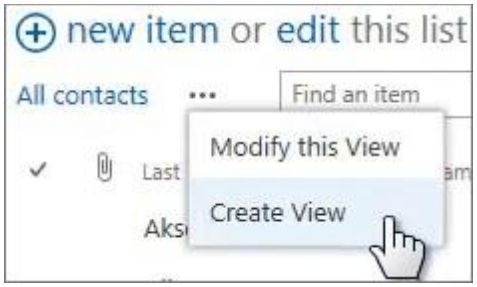
1. In the list, point to the heading you want to sort or filter the list by, and then click the arrow that appears
2. To sort by the heading, click **A on Top** or **Z on Top**.
3. To filter, select the one or more check boxes.



To save the view you created, click **SAVE THIS VIEW** at the top of the list near the **Search** box.

CREATE A PERSONAL VIEW OF A LIST

1. At the top of the list, click the ellipses (**…**) between the view names and the **Search** box, and then click **Create View**.



Choose a view type or start from an existing view.

On the **Create View** page, type a name for the view.

Select the columns you want to appear, and use the position numbers to set the order of the columns.

Set the sorting, filter, and other options, and then click **Save**.

SEE ALSO:

- Introduction to lists
  http://office.microsoft.com/en-us/sharepoint-help/introduction-to-lists-HA102771955.aspx
- Add, edit, or delete list items
  http://office.microsoft.com/en-us/sharepoint-help/add-edit-or-delete-list-items-HA102771938.aspx
- Create, change, or delete a view of a list or library
  http://office.microsoft.com/en-us/sharepoint-help/create-change-or-delete-a-view-of-a-list-or-library-HA102774516.aspx
- Create, change, or delete a column in a list or library
  http://office.microsoft.com/en-us/sharepoint-help/create-change-or-delete-a-column-in-a-list-or-library-HA102771913.aspx

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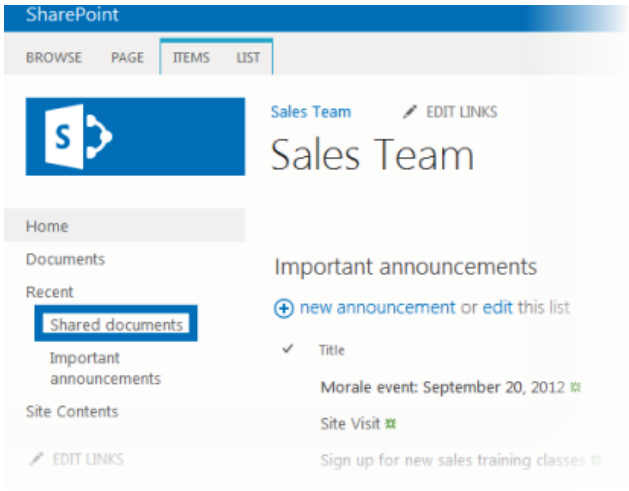
INTRODUCTION TO LIBRARIES

A document library is a place on a SharePoint site where you can share files, such as Word documents and Excel spreadsheets, with other people.

HOW DO I FIND A DOCUMENT LIBRARY?

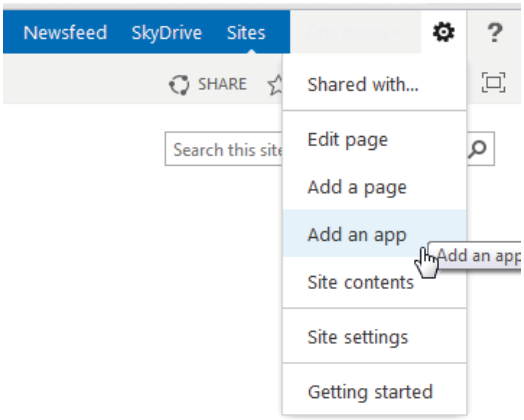
1. If your department has a team site, look for Shared documents or a similar name, typically on the left side.

Click the name of the library to open it.

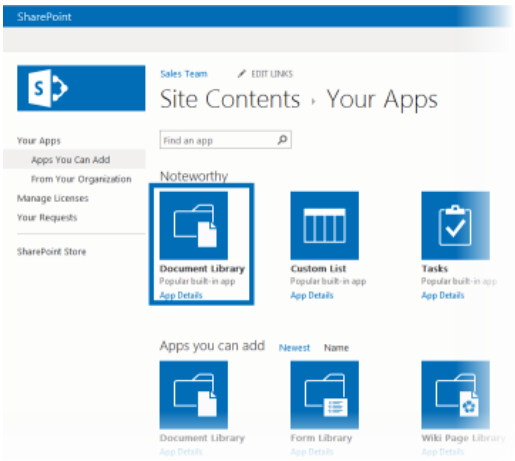


HOW DO I CREATE A LIBRARY?

1. On the Settings menu, click **Add an app**.



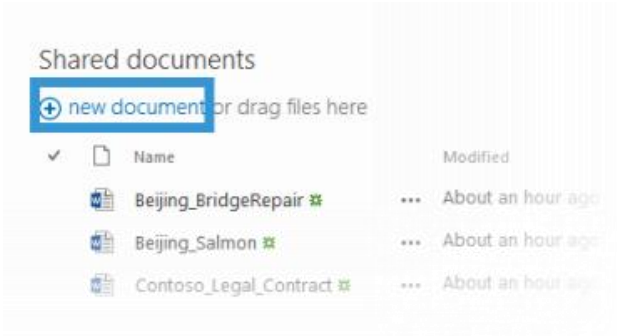
Click the library you want to add, in this case Document Library.



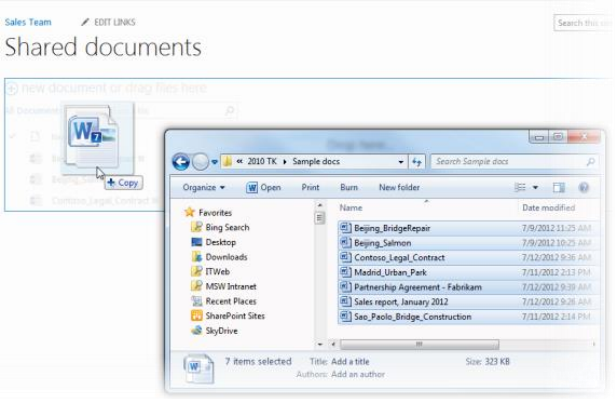
Name the library, and then click **Create**.

ADD FILES TO A LIBRARY

1. There are different ways to add files to a library, but the quickest way is to click the new document link.



You can also add more than one document at a time, and even drag files from Windows Explorer.

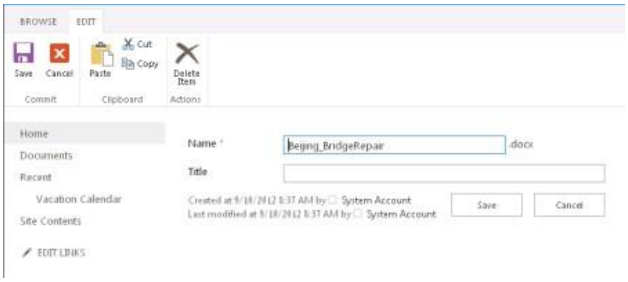


RENAME FILES IN A LIBRARY

1. Click on the ellipses next to a file you want to rename, and then click the ellipses on the callout.

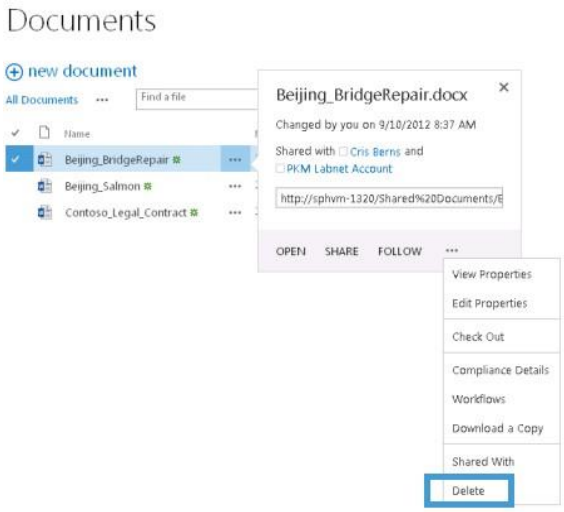
Click **Edit Properties**.

Rename the file in the **Name** field and click **Save**.



DELETE FILES IN A LIBRARY

1. Click on the ellipses next to a file you want to delete, and then click the ellipses on the callout.
2. Click **Delete**.
3. Click **OK** to confirm sending the file to the Recycle Bin.



VERSIONING, ALERTS, OR CO-AUTHORING

Libraries have other features to help you be more productive, such as:

- Versioning enables you to track versions of files, so you can see a history of changes, and restore a version if you make a mistake.
- Alerts let you know by mail or text if a file has been changed. You can set an alert for one file or a whole library, and control how often you get alerted.
- Co-authoring enables you and other co-workers to edit files at the same time in certain Office programs, such as Word, PowerPoint, and Excel.

SEE ALSO:

- Introduction to libraries
  http://office.microsoft.com/en-us/sharepoint-server-help/introduction-to-libraries-HA102771924.aspx?CTT=1
- Add or delete files in a library
  http://office.microsoft.com/en-us/sharepoint-server-help/add-or-delete-files-in-a-library-HA102803549.aspx?CTT=3
- Enable and configure versioning for a list or library
  http://office.microsoft.com/en-us/sharepoint-server-help/enable-and-configure-versioning-for-a-list-or-library-HA102772148.aspx?CTT=3
- Create an alert
  http://office.microsoft.com/en-us/sharepoint-server-help/create-an-alert-or-subscribe-to-an-rss-feed-HA102771918.aspx?CTT=1

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SHARE DOCUMENTS AND MANAGE VERSIONS

Share a document with your co-workers to allow them to review or edit your document, and learn how to track document versions or return to a previous one.

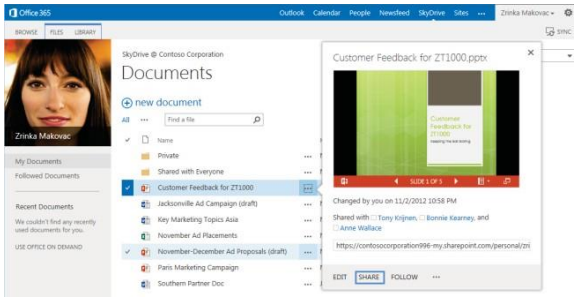
Note that the capabilities described here depend on whether your organization has set up and customized personal sites and profiles.

SHARE A DOCUMENT

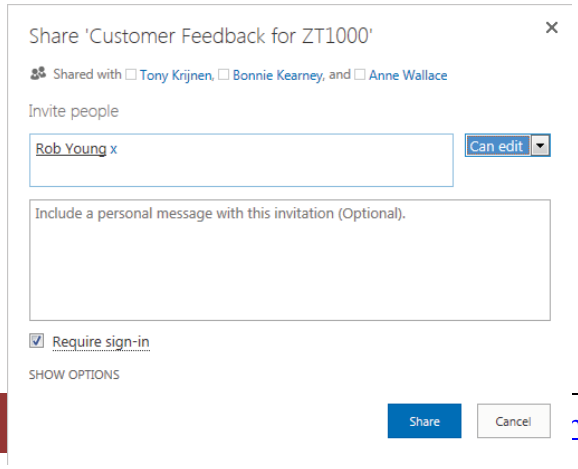
If you're using Office 365, you may be able to invite external users (people not on your network) to share a document, by inviting them as "Guests." For details, see Share sites or documents with people outside your organization.

To share a document with others in your organization:

1. Click **SkyDrive** in the header at the top of a SharePoint or Office 365 site in your organization.
2. Click the ellipses (**...**) next to the document to open the document's callout and then click **Share**.



In the **Share** window, enter the name of each person you want to invite to share the document.



From the drop-down menu, click the permission, **View** or **Edit**, that you want to grant invitees.

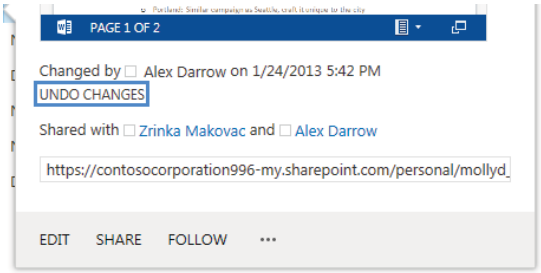
Type a message to be sent to all invitees in an email, or click **Show Options** and then uncheck **Send an email invitation**.

If you don't send an email to invitees, they won't get notified that you've shared the document. However, they can see the document if they visit your **SkyDrive** library, or if they search for the document.

MANAGE DOCUMENT VERSIONS

To see your own most recent version of a **SkyDrive Pro** document:

1. Click **SkyDrive** in the header at the top of any SharePoint site in your organization.
2. Click the ellipsis (**...**) next to the document to display its details page. You can see who edited the document and the date of those changes.



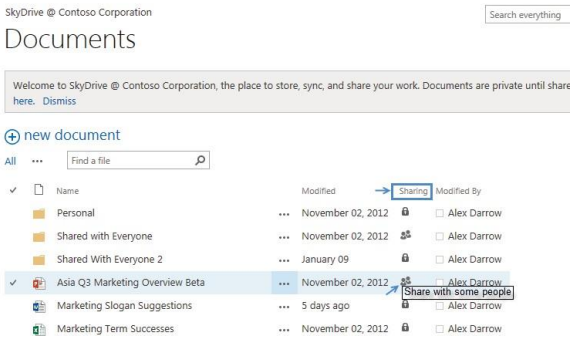
To return to your own most recent version of the document, select **UNDO CHANGES**.

VIEW OR EDIT A DOCUMENT THAT'S SHARED WITH YOU

1. Click the document link in the email you received informing you that a co-worker has shared a document with you.
2. If you don't have edit permission, review the read-only document and save any notes or other work in a separate file.
3. If you have edit permission, check out the document, edit it, and click **File ! Save** to save your changes.

ADD MORE PEOPLE TO THE SHARING LIST

Click the **Shared with some people** icon in the **Sharing** column and invite additional people to view or edit the document.



SEE ALSO:

- Share items in SkyDrive Pro
  http://office.microsoft.com/en-us/sharepoint-server-help/share-items-in-skydrive-pro-HA102788380.aspx
- Manage document versions
  http://office.microsoft.com/en-us/office365-sharepoint-online-enterprise-help/manage-document-versions-in-your-skydrive-pro-library-HA103158256.aspx?CTT=1
- Collaborate on documents
  http://office.microsoft.com/en-us/sharepoint-server-help/collaborate-on-documents-HA102785873.aspx?CTT=1
- Share sites or documents with people outside your organization
  http://office.microsoft.com/en-us/office365-sharepoint-online-enterprise-help/share-sites-or-documents-with-people-outside-your-organization-HA102894713.aspx
- Video: Share documents
  http://office.microsoft.com/en-us/redir/VA102897384.aspx
- Video: Manage SkyDrive Pro document versions
  http://office.microsoft.com/en-us/redir/VA102897389.aspx

FOLLOW A DOCUMENT OR WEBSITE IN YOUR ORGANIZATION

Follow a document to see notifications in your newsfeed when someone updates the document or shares it with others, and to keep the document handy in a followed documents list. Follow a site to keep it accessible in a list of followed sites and to see site feed activity in your own newsfeed.

Note that the capabilities described here depend on whether your organization has set up and customized personal sites and profiles.

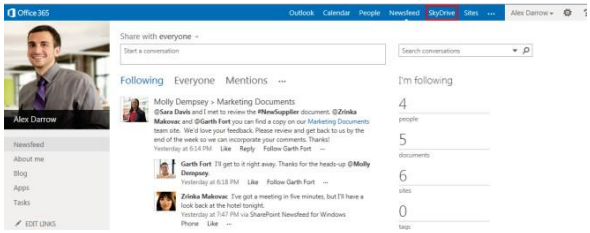
FOLLOW A DOCUMENT

Before you can follow a document, you need permission to access it. You're granted this permission when another person shares the document with you. Typically, you can follow documents in a **Shared with Everyone** folder.

To follow a document:

1. Browse to a document library on a SharePoint or Office 365 team site.

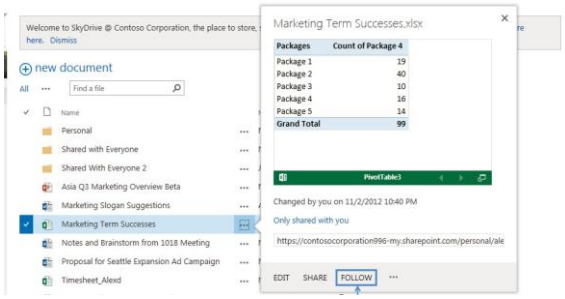
   To browse to your personal library, click **SkyDrive Pro** in the header.



Click the library or folder that contains the document or other file you want to follow.

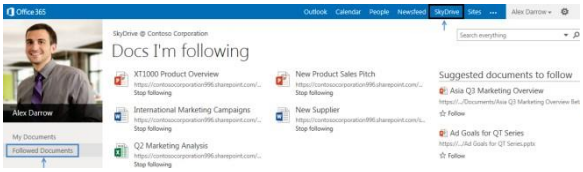
Click the ellipses (**…**) next to the document.

Click Follow.



FIND A DOCUMENT THAT YOU FOLLOW

1. Click **SkyDrive** in the header from a SharePoint or Office 365 site.
2. Click **Followed Documents** in the **Quick launch** on the left.



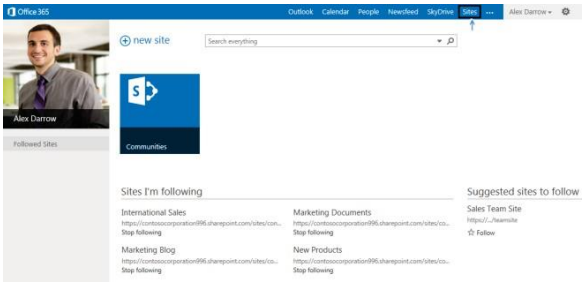
Or, click **Newsfeed** in the header and then click the number for documents under **I'm following**.
Your followed documents appear under **Docs I'm following**.

FOLLOW A WEB SITE

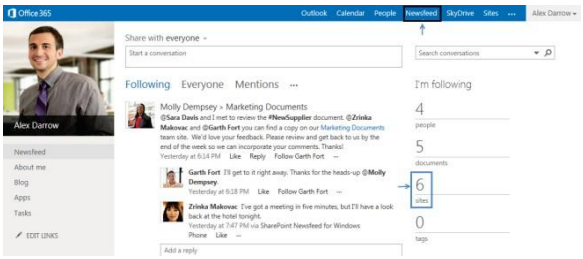
1. Go to a SharePoint site that you want to follow.
2. Click **Follow** in the top right of the page.
3. If the site has a newsfeed, to stay up to date with site news, look for updates from the site feed in your own newsfeed.

FIND A WEB SITE THAT YOU FOLLOW

Click **Sites** in the header.



Or, click **Newsfeed** in the header and then click the number for sites under **I'm following**.



Your followed sites appear under **Sites I'm following**.

SEE ALSO:

- Follow documents to track them
  http://office.microsoft.com/en-us/office365-sharepoint-online-small-business-help/follow-documents-to-track-them-HA102785928.aspx
- Follow sites that interest you
  http://office.microsoft.com/en-us/office365-sharepoint-online-enterprise-help/follow-sites-that-interest-you-HA102785930.aspx?CTT=1
- Video: Follow documents
  http://office.microsoft.com/en-us/redir/VA102897380.aspx
- Video: Follow a SharePoint site
  http://office.microsoft.com/en-us/redir/VA102897383.aspx

UPDATE YOUR PROFILE

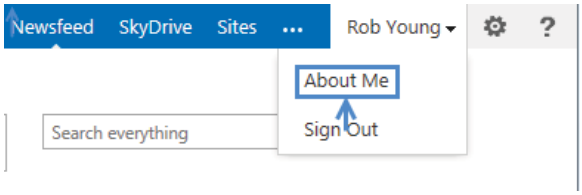
Update your profile to introduce yourself to co-workers and update privacy settings so you can share or hide personal information according to your needs. Note that your profile pages and the items you can edit may differ from the descriptions below, depending on how your administrators have customized profile pages for your organization.

WHERE IS MY PROFILE?

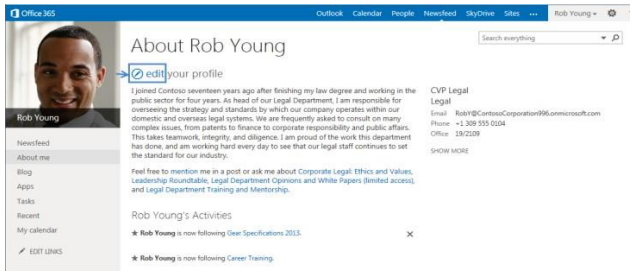
You'll find a link to your profile in the top right corner of any of your organization's SharePoint 2013 or Office 365 web pages.

VIEW OR EDIT YOUR PROFILE

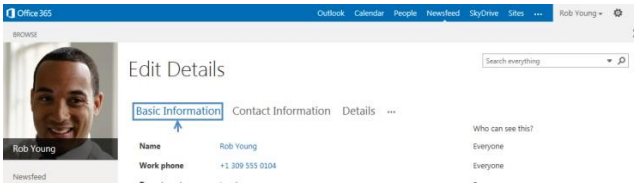
1. Click **<your name> ❗ About Me**.



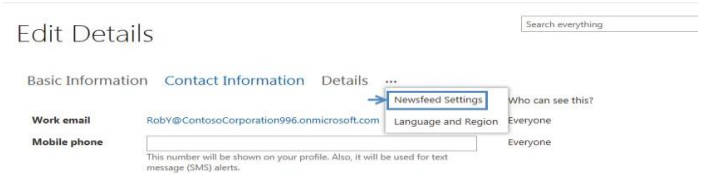
Click edit your profile to display the Edit Details.



Review or edit your **Basic Information** page or go to another page by clicking **Contact Information** or **Details**.

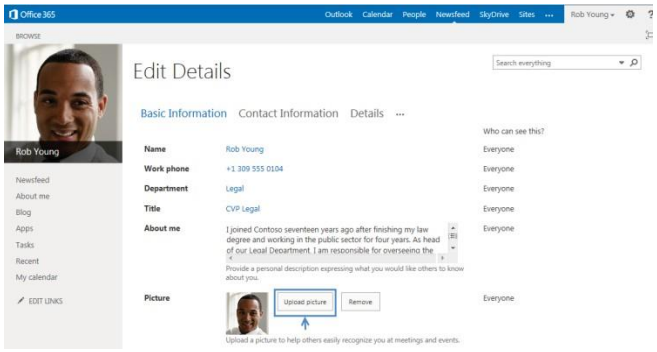


To review or edit your **Newsfeed settings** page, click the ellipses (**...**) and then click **Newsfeed Settings**.

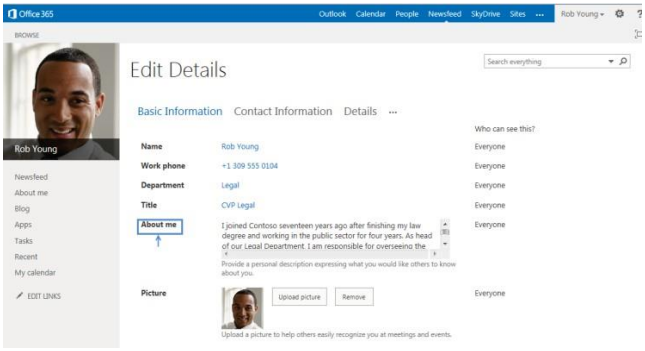


UPDATE YOUR PROFILE PICTURE AND DESCRIPTION

1. Open your profile for editing.
2. Under **Basic information**, click **Upload picture**.
3. Browse to locate the picture you want.
4. Click **Upload**.



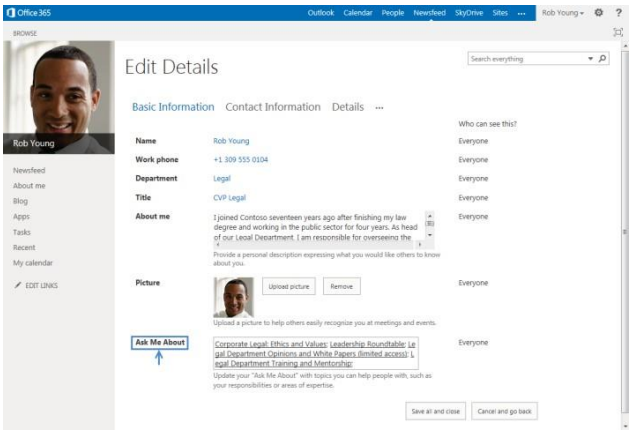
To add or update your **About me** text, click in the **About me** box and type a personal description. Use the formatting tools in the ribbon to add special text effects such as color, bold type, and bullets.



Click **Save all** and close.

LIST YOUR AREAS OF EXPERTISE

1. Open your profile for editing.
2. Under **Basic Information**, click in the **Ask Me About** box.

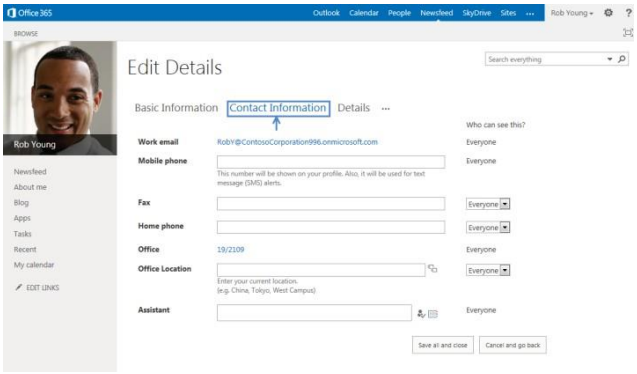


Type key words in the box. Separate multiple keywords with semicolons. If you see an appropriate suggestion, click the keyword.

Click **Save all** and close.

UDATE YOUR CONTACT INFORMATION

1. Open your profile for editing.
2. Click **ContactInformation**.

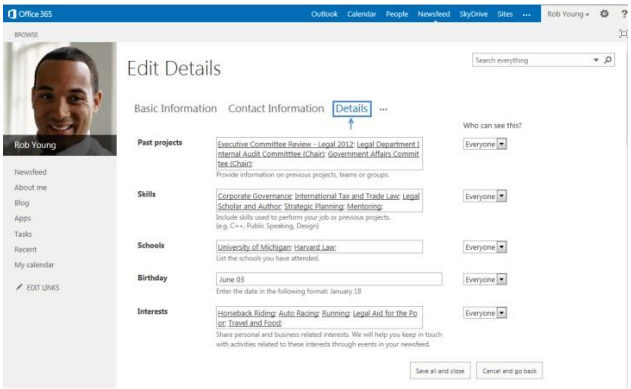


Edit your phone number and other contact information as needed.

Click **Save all** and close.

UPDATE YOUR PERSONAL DETAILS

1. Open your profile for editing.
2. Click **Details**.



To list past projects or other information that you might want to share or make note of, add some key words to the **Past projects** or other list boxes.

If you want display or note your birthday, type the date in the **Birthday** box.

Click **Save all** and close.

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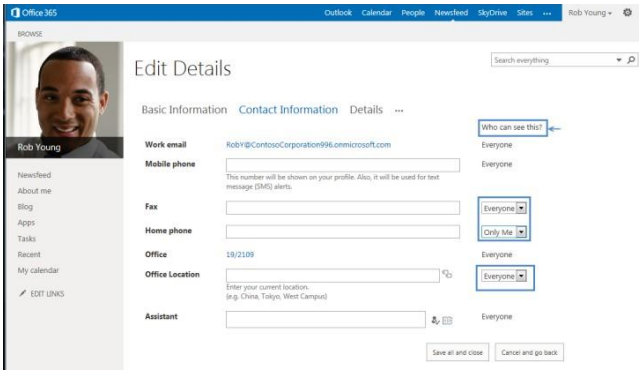
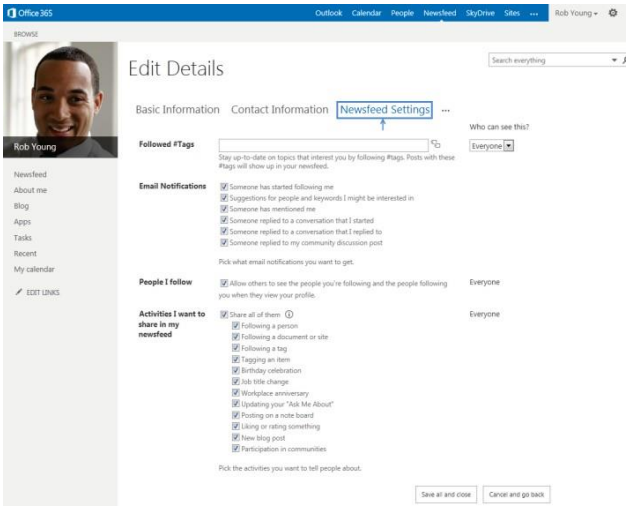
UPDATE YOUR PROFILE PRIVACY SETTINGS

1. Open your profile for editing.
2. Click **Contact Information** or **Details**.
3. Under **Who can see this?** click the down arrow to the right of an item you want to change.
4. Click **Everyone** or **Only Me**.



UPDATE YOUR NEWSFEED SETTINGS

1. Open your profile for editing.
2. Click the ellipses (**…**) and then click **Newsfeed Settings**.



Under **Who can see this?** click the down arrow to the right of an item you want to change.

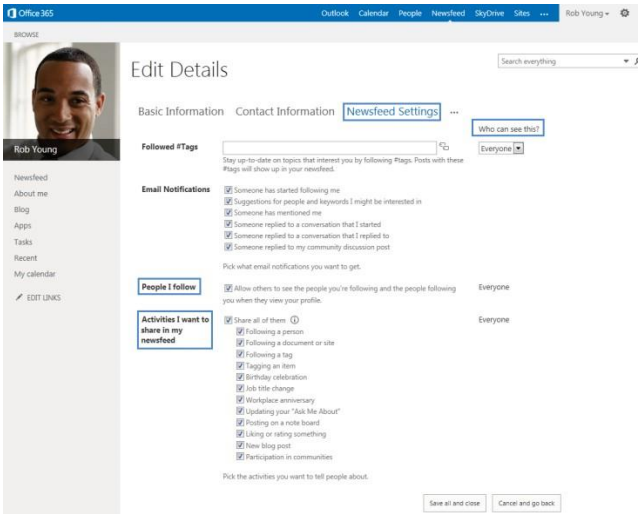
To see posts in your newsfeed about specific topics, type key words in the **Followed #Tags** box.

To specify which activities you want to be notified about in email, in the **Email Notifications** section, select the items that interest you.

To specify what information you want to share with people in your organization, update the **Who can see this?** setting for your **Followed Tags**, and select or clear the **People I follow** option and **Activities I want to share items** as needed.

UPDATE YOUR NEWSFEED PRIVACY SETTINGS

1. Open your profile for editing.
2. Click the ellipses (**…**) and then click **Newsfeed Settings**.
3. To change who can see your list of **Followed #Tags**, under **Who can see this?** click **Everyone** or **Only Me**.
4. To change who can see the lists of people that you follow and people who follow you, select or clear the **People I follow** option.
5. To specify activities you want to share with people in their newsfeeds, select the **Activities I want to share items** that you want profile visitors to be able to see.



SEE ALSO:

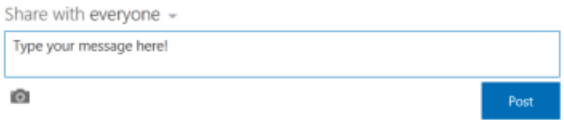
- View and set up your profile.
  http://office.microsoft.com/en-us/sharepoint-server-help/view-and-set-up-your-profile-HA102785967.aspx
- Update your profile privacy settings
  http://office.microsoft.com/en-us/office365-sharepoint-online-enterprise-help/update-your-profile-privacy-settings-HA103338255.aspx
- Update your newsfeed privacy settings
  http://office.microsoft.com/en-us/office365-sharepoint-online-enterprise-help/update-your-newsfeed-privacy-settings-HA102781017.aspx
- Video: Update your profile
  http://office.microsoft.com/en-us/redir/VA102897378.aspx
- Video: Update your profile privacy settings
  http://office.microsoft.com/en-us/redir/VA102897377.aspx
- Video: Update your newsfeed privacy settings
  http://office.microsoft.com/en-us/redir/VA104011765.aspx

POST TO THE NEWSFEED

Start conversations with people in your organization by posting to a newsfeed, either on your personal site, or in team site newsfeeds.

CREATE A SIMPLE POST

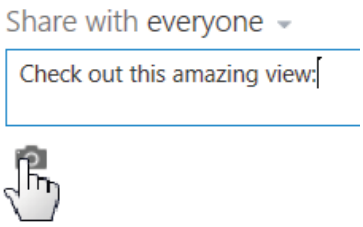
1. Click in the **Start a conversation** box.
2. Type your message.



Click **Post**.

ADD A PICTURE TO A POST

1. Click in the **Start a conversation** box.
2. Type a message (optional)
3. Click the camera button.

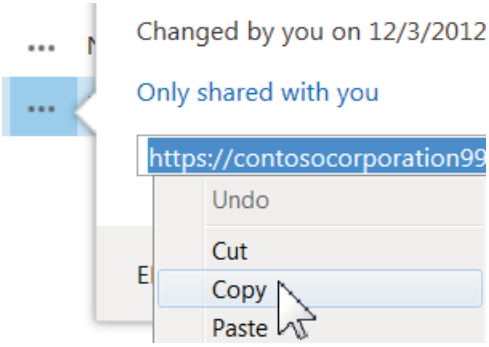


Browse to the picture you want and click **Open**.

Click **Upload**.

ADD A LINK TO A DOCUMENT TO A POST

1. Go to the SharePoint library that has the document.
2. Click the ellipses menu to open the document callout.
3. Copy the document URL.



Click **Newsfeed** at the top of the page (or go to the team site newsfeed you want).

Click in the **Start a conversation** box.

Right-click and paste in the document URL.

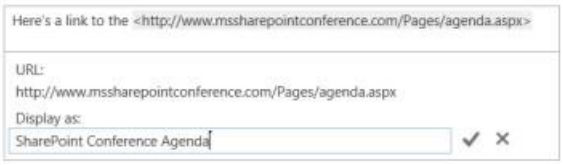
Click in the **Display As box**, type the words you want to appear as the document link, and click the check mark.

Click **Post**.

ADD A WEBLINK TO A POST

1. Go to the web page you want to link to.
2. Copy the web page URL.
3. Click **Newsfeed** at the top of the page (or go to the team site newsfeed you want).
4. Click in the **Start a conversation** box.
5. Right-click and paste in the web page URL.

Click in the **Display As** box, type the words you want to appear as the weblink text, and click the check mark.



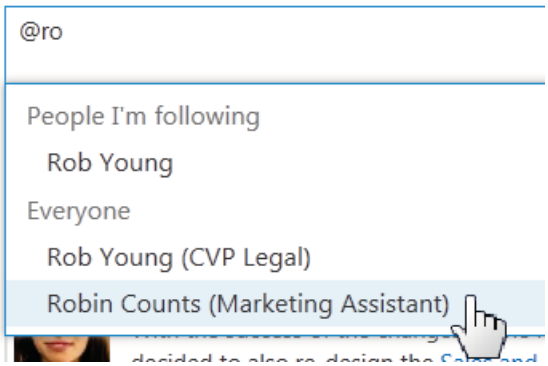
Click Post.

ADD A VIDEO TO A POST

Use the same procedure as described above for "**Add a weblink to a post.**"

MENTION SOMEONE IN A POST

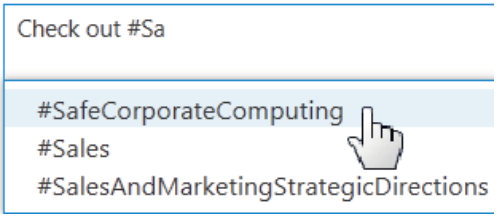
1. Click in the **Start a conversation** box.
2. Type a @ character.
3. Start typing the name of the person you want to mention.
4. Select the name if you see it in the list.



Finish the post and then click Post.

ADD A HASHTAG TO A POST

1. Click in the **Start a conversation** box.
2. Type a # character.
3. Start typing the tag you want to add.
4. If available, select an existing tag from the list.



Finish the post and then click **Post**.

SEE ALSO:

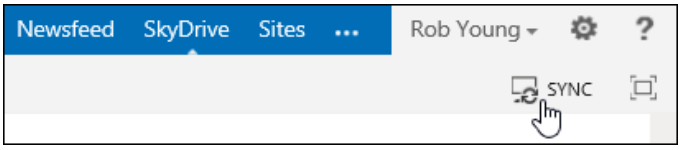
- Post something to everyone
  http://office.microsoft.com/redir/HA102785948.aspx
- Add features to a newsfeed post
  http://office.microsoft.com/redir/HA10278575.aspx
- Follow tags to get information about topics that interest you
  http://office.microsoft.com/redir/HA102785925.aspx
- Follow people to keep track of their activities
  http://office.microsoft.com/redir/HA102785944.aspx
- What items appear in your newsfeed
  http://office.microsoft.com/redir/HA102785941.aspx

SYNC SHAREPOINT LIBRARIES TO YOUR COMPUTER USING SKYDRIVE PRO

If you have Office 2013, or an Office 365 subscription that includes Office 2013 applications, you can sync your SkyDrive Pro and other SharePoint libraries to your computer. You can then work with your library files directly in your file system, and have access to your files when you're offline.

SYNC YOUR SKYDRIVE PRO LIBRARY

1. Go to your **SkyDrive Pro** library.
2. Click Sync at the top of the page.



In the **SkyDrive Pro** wizard, click **Sync Now**.

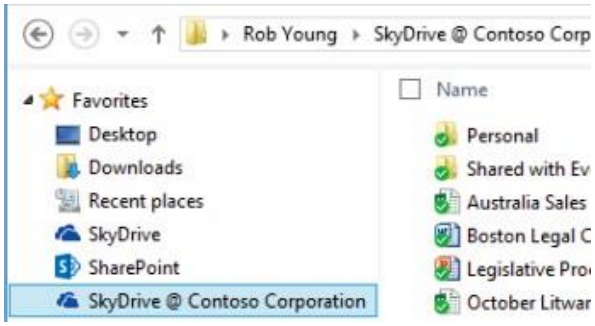
Click **Show My Files** to go to the synced library folder.

SYNC A TEAM SITE LIBRARY

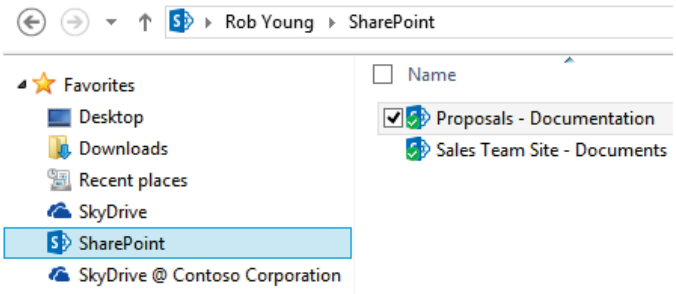
Go to the team site library you want to sync and then do steps 2-4 described above.

FIND SYNCED LIBRARIES IN YOUR FILE SYSTEM

1. Open **Files Explorer**.
2. Look under **favorites**.
3. Your **SkyDrive Pro** library folder is placed under **Favorites** as **SkyDrive Pro**, or **SkyDrive @Organization**:



Team site library folders are placed under Favorites in the SharePoint folder:

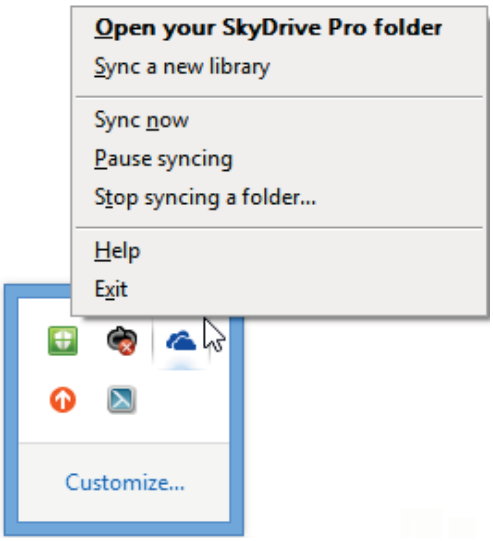


DO SHAREPOINT ACTIVITIES WITH YOUR SYNCED FILES

1. Open the synced library folder in your file system.
2. Right-click a file, click **SkyDrive Pro**, and then click a menu option:
   a. Select **Go to Browser** to see the selected file on the SharePoint site in a Web browser.
   b. Select **Copy link** to copy the file's Web URL in order to paste the link in another location such as an email.
   c. Select **Share…** to open the **Share** dialog box on the SharePoint site in order to send an invitation to share the file with other people.

MANAGE SYNCED SHAREPOINT LIBRARIES

1. Click the **SkyDrive Pro** icon in the Windows taskbar.



Select the menu option you want.

SEE ALSO:

- Sync a library to your computer
  http://office.microsoft.com/redir/HA102832401.aspx
- Find libraries you've synced on your computer
  http://officecms/sites/preview/search/redir.aspx?AssetId=HA102849774&lc=en-us
- Manually sync a folder your syncing with a SharePoint library
  http://office.microsoft.com/redir/HA102849774.aspx
- Stop syncing a folder with a SharePoint library
  http://office.microsoft.com/redir/HA102850041.aspx
- Share files in a folder you're syncing with a SharePoint library
  http://office.microsoft.com/redir/HA102780982.aspx

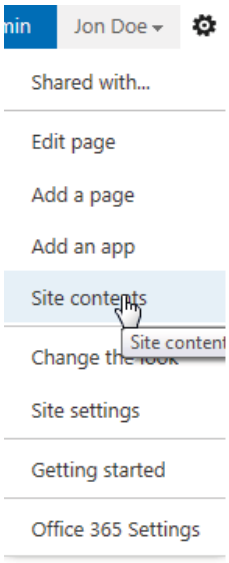
CREATE AND MANAGE A SHAREPOINT BLOG

You can create a SharePoint blog to quickly share ideas and information in an informal way.

HOW DO I CREATE A BLOG?

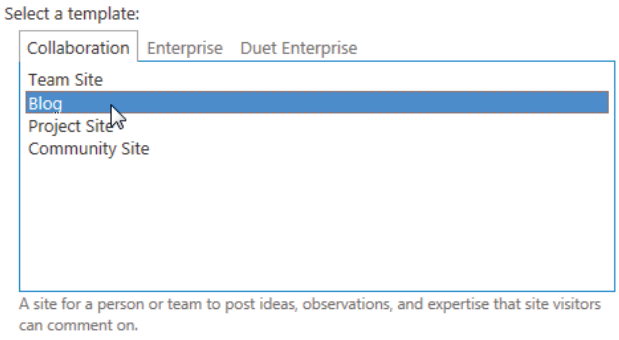
Open your SharePoint site.

On the **Settings** menu, click **Site contents**.



Click **new subsite**.

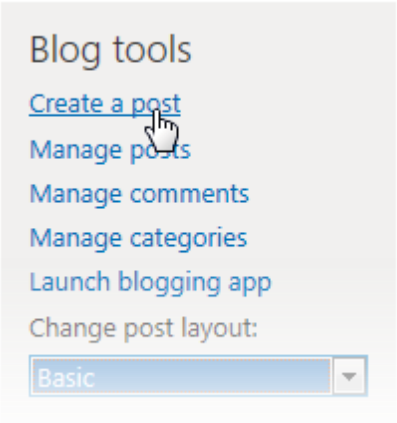
Enter a title, description, and URL. Under **Select a template**, select **Blog**.



Click **OK**.

CREATE A POST

1. On the home page of the SharePoint blog, under **Blog tools**, click **Create a post**.



Enter a title, and an optional description.

In the **Category** section, select as many categories as you want the post to be associated to, and click **Add**.

Enter a publish date.

Click **Publish**.

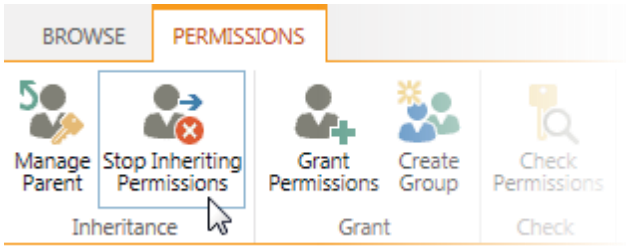
ADD CATEGORIES

1. On the home page of the SharePoint blog, under **Blog tools**, click **Manage categories**.
2. Click **new item**.

Type a category name, and click **Save**.

BREAK INHERITANCE FROM THE PARENT SITE FOR A BLOG

1. Open your SharePoint blog.
2. On the Settings menu, click **Site settings**.
3. Under **Users and Permissions**, click **Site permissions**.
4. On the **Permissions** tab, click **Stop Inheriting Permissions**.



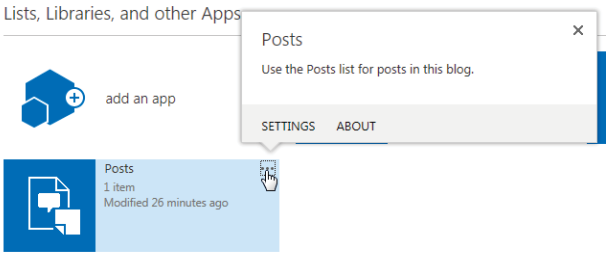
Click **OK**.

CREATE UNIQUE PERMISSIONS FOR LISTS AND LIBRARIES IN A BLOG

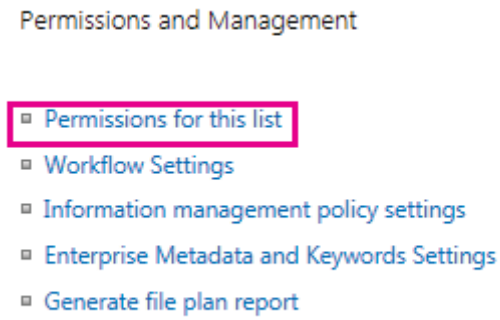
1. Open the SharePoint blog.

On the **Settings** menu, click **Site contents**.

Click on the ellipsis next to **Posts** and then click **Settings**.



On the **Settings** page, click **Permissions for this list**.



On the **Permissions** tab, click **Stop Inheriting Permissions**.

Click **OK**.

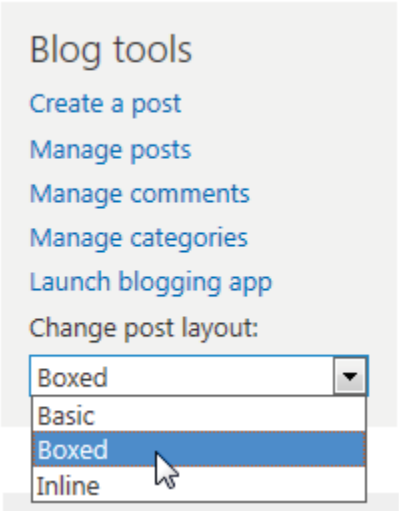
You can now add users and groups, and give them specific permissions. To do that, click **Grant Permissions**, on the ribbon.

Enter a user or group name, or email address.

Click **Show Options**, and then select a permission level from the dropdown. Then click **Share**.

CHANGE A BLOG POST LAYOUT

On the home page of your SharePoint blog, under **Blog Tools**, select a post layout.



SEE ALSO:

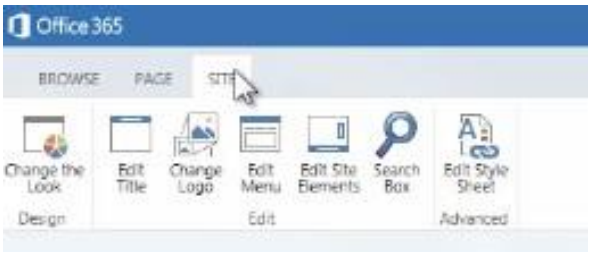
- Introduction: Control user access with permissions
  http://office.microsoft.com/en-us/support/introduction-control-user-access-with-permissions-HA102771919.aspx
- What is permissions inheritance?
  http://office.microsoft.com/en-us/office365-sharepoint-online-enterprise-help/what-is-permissions-inheritance-HA102772762.aspx

CUSTOMIZE YOUR PUBLIC WEBSITE

This course teaches you how to change the design and layout of your public site. You'll also learn to add your company logo, customize the footer and site navigation, and fine tune your design by customizing the cascading style sheet.

CHANGE THE LOOK

1. Click the **Site** tab.



Click **Change the Look.**

Choose a design.

Change the background picture.

Change the color.

Choose the site layout.

Choose the font.

Click **Try it out** to preview your changes.

When satisfied, click **Keep it**.

CHANGE THE TITLE AND LOGO

1. Click the **Site** tab.
2. Click **Edit Title**.
3. Replace the default title with your own, and then click **OK**.
4. Click the **Site** tab.
5. Click **Change Logo**.
6. Click **From Computer** to upload a logo image.
7. Type a description.

Click **OK.**

CHANGE THE PAGE NAVIGATION

1. Click the **Site** tab.
2. Click **Edit Menu** (or click **Edit Links** on the page).
3. Make the desired changes.
4. Click **Save**.

CUSTOMIZE THE HEADER AND FOOTER

1. Click the **Site** tab.
2. Click **Edit Site Elements**.
3. Make the desired changes.
4. Click **Save**.

CUSTOMIZE THE CSS

1. Click the **Site** tab.

Click Edit **Style Sheet**.

Make the desired changes.

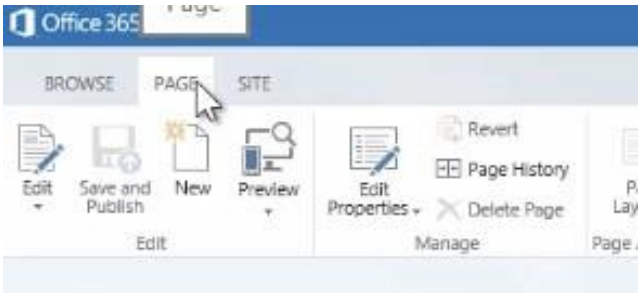
Click **Save**.

CREATE AND CUSTOMIZE PAGES ON YOUR PUBLIC WEBSITE

Your public website in Office 365 includes web pages that you can customize by adding your own page content, including text, images, videos, and apps. This course teaches you how to add and customize pages, manage pages, and create and manage blog posts.

ADD A PAGE

1. From anywhere within your public website click **Page ! New**.

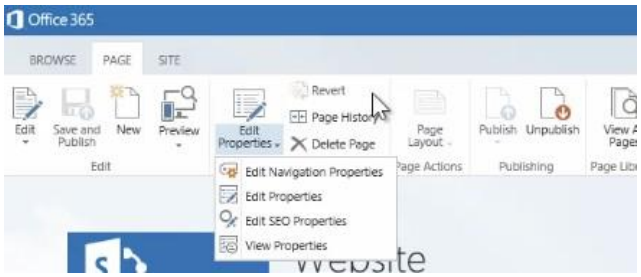


Give the page a name and click **Create**.

Click **Format Text ! Save** to save the draft.

EDIT A PAGE

1. Navigate to the page on your public website that you want to edit.
2. Click the **Page** tab and choose **Edit**.



UPLOAD AN IMAGE FROM YOUR COMPUTER

1. Navigate to the page on your public website where you want to add an image.
2. Click **Insert ! Picture ! From Computer ! Browse**.
3. Select the desired picture and click Open.

HIDE LINKS IN THE NAVIGATION

1. From within the navigation on your public website, click **Edit Links**.
2. Click the **Hide** icon.
3. Click **Save**.

DELETE A PAGE

1. Navigate to the page on your public website that you want to delete.
2. Click **Page ! Delete Page**.
3. Click **OK** to confirm.

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CREATE NEW BLOG POSTS USING THE BLOG POST EDITOR

1. Click the BLOG link on your website.
2. Under **Blog tools**, click **Create a post**.
3. Enter a title and body content, including text, images, videos, etc.
4. Select a category and publishing date.
5. Click **Publish**.

CREATE NEW BLOG POSTS WITH MICROSOFT WORD

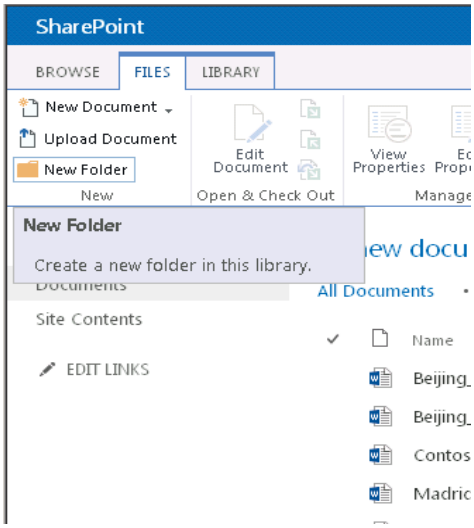
1. Click the Blog link on your website.
2. Under Blog tools, click **Launch blogging app**. Register the blog account if prompted.
3. Click the **Blog Post** tab and choose **Publish**.

ORGANIZE AND CONFIGURE A SHAREPOINT LIBRARY

There are several ways to organize and manage your SharePoint libraries. This intermediate course teaches you how to create and use folders, sort and filter with columns, create custom views of items in the library, and how to restrict access to a library.

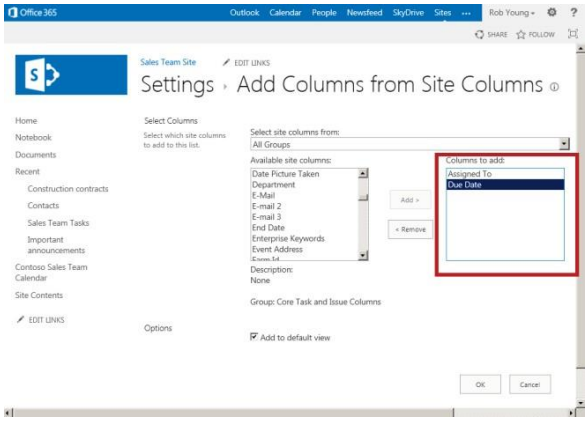
CREATE FOLDERS IN A LIBRARY

1. Navigate to the library you want to create a folder in.
2. On the **Files** tab, choose **New Folder**.
3. Enter a name for the folder and choose **Save**.



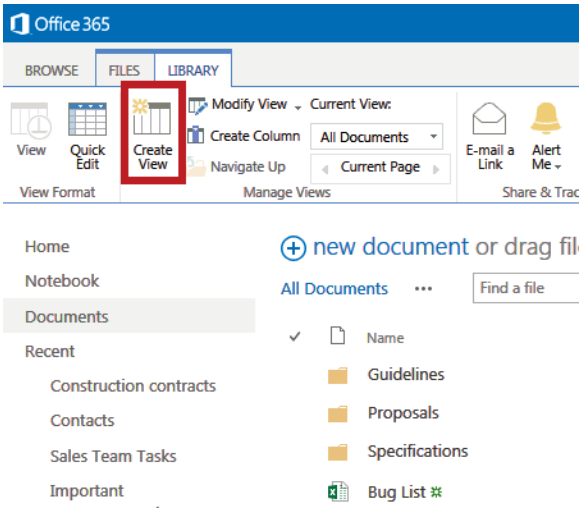
ADD COLUMNS TO A LIBRARY

1. Navigate to the library you want to add columns to.
2. On the **Library** tab, choose **Library Settings**.
3. Scroll down to the **Columns** section and choose **Add from existing site** columns.
4. Under **Available site** columns, choose and add the columns you want in your library, and then choose **OK**.



CREATE A CUSTOM VIEW OF ITEMS IN YOUR LIBRARY

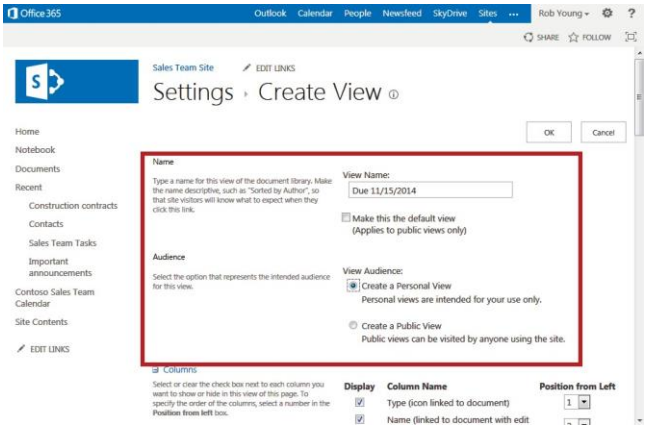
1. Navigate to the library you want to create a view for.
2. On the Library tab, choose **Create View**



If you want to start from an existing view, choose the view under **Start from an existing view**.

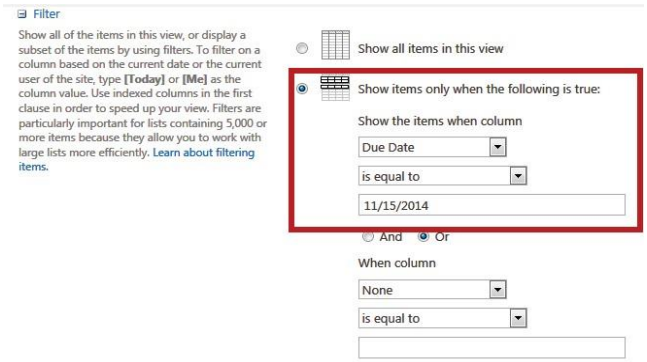
On the **Settings** page, type a name for the view.

Choose **Create a Personal View** in the **Audience** section if you don't want others to use this view.



CREATE A CUSTOM VIEW OF ITEMS IN YOUR LIBRARY (CONT.)

1. Under the **Filter** section, choose **Show items only** when the following is true.
2. In the field drop down box, select the column you want to add, Due Date for example.
3. In the next field, choose a condition such as is equal to, for example.
4. In the next field, enter a date you will later filter by, such as 11/15/2014, for example.

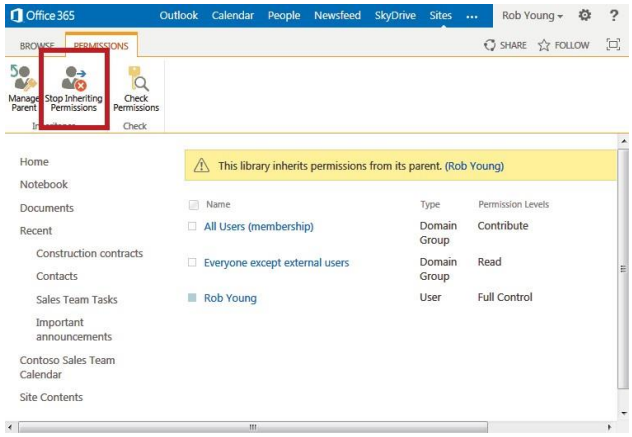


Finally, in the **Folders** section of the page, choose **Show all items without folders**. This option enables you to look at files across folders in a library.

Choose **OK**. The new view appears displaying all files having 11/15/2014 under the **Due Date** column, regardless of what folder they are in.

CONTROL WHO HAS ACCESS TO YOUR SHAREPOINT LIBRARY

1. Navigate to the library you want to share with colleagues.
2. On the **Library** tab of the ribbon, choose **Library Settings**.
3. On the **Settings** page choose the **Permissions** for this document library link.
4. If the library inherits permissions from a parent site, choose **Stop Inheriting Permissions** on the **Permissions** tab.



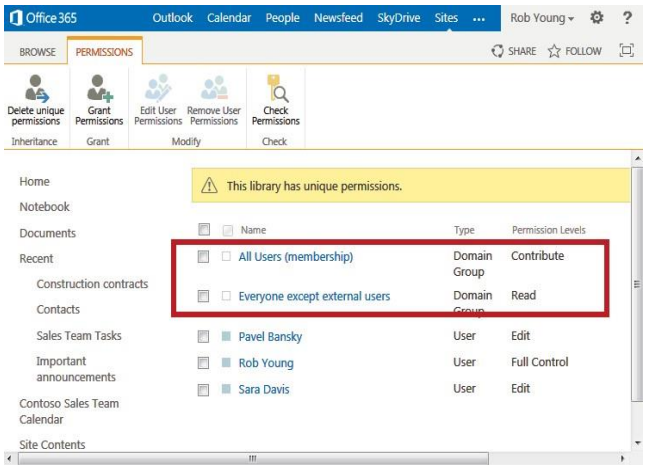
Click **OK** on the message that appears.

In the **Share** dialog box, type the names or email addresses of those who will have access to the library.

Optional: Add a short message to tell them about the library, and then select **Share**.

To remove permissions that existed before you stopped inheriting permissions, select those groups or users and then choose **Remove User Permissions**.

IMPORTANT: Make sure you have permissions to your own library.



Now, only the people that you added in the **Share** dialog have access to the documents in the library.

SEE ALSO:

- Sync a library to your computer
  http://office.microsoft.com/en-us/support/sync-a-library-to-your-computer-HA102832401.aspx
- Manage lists and libraries with many items
  http://office.microsoft.com/en-us/office365-sharepoint-online-enterprise-help/manage-lists-and-libraries-with-many-items-HA101967267.aspx?CTT=1

POST TO A TEAM SITE FEED

Some posts or conversations are better suited for a small group of people, rather than the newsfeed on your personal site. For these cases, you can create or start following team sites that contain their own site feeds. For convenience and visibility, posts on team sites you're following also appear in the newsfeed on your personal site.

NOTE Tasks described in this article may depend on your SharePoint permissions. For more information, see your administrator.

CREATE A TEAM SITE

1. Click **Sites** at the top of the page.

Click **New Site**.

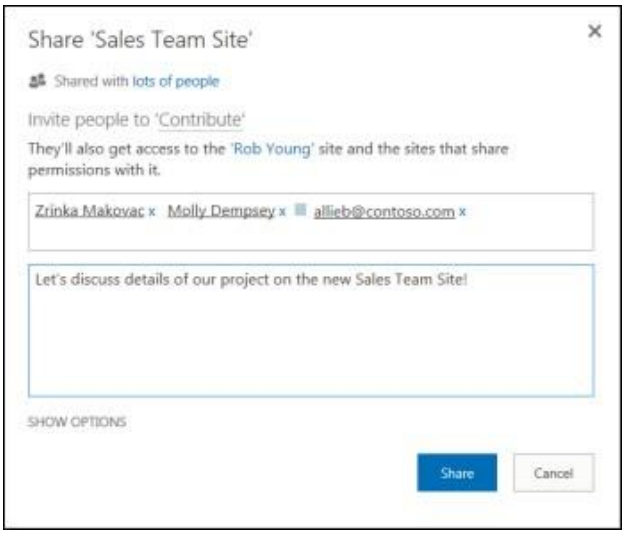
Enter a name for the new site and click **Create**. The site appears after a few moments. You automatically follow new sites you create.

INVITE PEOPLE TO A TEAM SITE

1. Go to the team site.
2. Click **Share** at the top of the page.

In the **Share** window, enter the names or email addresses of the people you want to invite to the site.

Accept the default **Contribute** permission so that people can post to the newsfeed.



Click **Share.**

Microsoft® SharePoint

Quick Reference Card

Tech Tips

START FOLLOWING A TEAM SITE

Following a site enables you to find it easily later on your Sites page. It also lets you post to its site feed from your personal site newsfeed.

1. Go to the site you want to start following.
2. Click **Follow** at the top of the page.

POST TO A SITE FEED WHILE VISITING A TEAM SITE

1. Go to the team site.
2. Find the **Newsfeed** web part on the team site **Home page**.

Create the post just as you'd create posts in your personal site newsfeed.

POST TO A TEAM SITE FEED FROM YOUR PERSONAL SITE NEWSFEED

1. Click **Newsfeed** at the top of the page.

Select the site feed you want to post to from the dropdown menu.

Create the post. The post appears with a reference to the team site it's associated with.

SEE ALSO:

- Post something to a small group of people
  http://office.microsoft.com/redir/HA102886562.aspx
- Add features to a newsfeed post
  http://office.microsoft.com/redir/HA102785751.aspx
- Create a site
  http://office.microsoft.com/redir/HA102773285.aspx
- Share a site
  http://office.microsoft.com/redir/HA103456668.aspx