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HOW TO

USE SHAREPOINT

A QUICK GUIDE



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Introduction

Have you recently migrated to SharePoint and are having trouble getting to grips with its features? Don't fret, you're not the only one! Countless new SharePoint users get in touch with us, that's why we created this 'Beginners Guide to SharePoint' to help users like you better understand the software and how to use it.

In this guide, we cover:

- What SharePoint Is
- How To Access SharePoint
- How To Access Your Files
- How To Search For A Document
- How To Upload Files To Your Document Library
- How To Collaborate On A Document
- How To Share A Document

What is SharePoint?

SharePoint is a document management and collaboration tool used to store important documents. The Microsoft-powered platform enables file storage, sharing, searching, archiving and reporting on all stored documents allowing you to access all of your content from any location.

SharePoint is very flexible and it's up to you as a business how many features you use.

How Do I Access SharePoint?

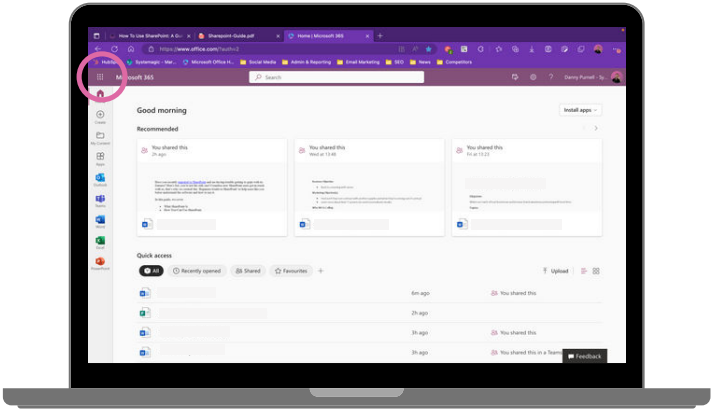
To access SharePoint, you will need to head to www.office.com in your preferred browser. Once you reach the Office website, you will need to log in to your Microsoft account using your 365 email and password.

How Do I Access My Files?

Once you have signed into your Microsoft account, your 'homepage' will appear. In the top right-hand corner, you will see 9 dots - this button will open your app menu, from which you can open SharePoint.

Your frequently visited sites will appear. You can access your files by either clicking on the relevant group on the left or in the middle of the page.

On the left-hand side of the screen, you will see the top-level folders. If you click one of these folders, this will show you all of the folders and documents within the top-level folder.



How to Search for a Document

To search for a document in SharePoint, you can use the search bar located at the top of the page. Simply type the name of the file or folder you're looking for and press enter.

You should now see a list of results matching your search criteria.

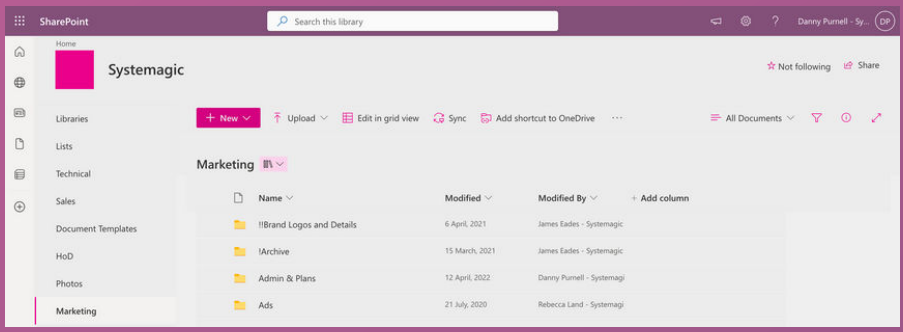
Forgot the name of your file? Don't worry! SharePoint also searches every file's content for the keyword or phrase, making it easy to find what you're looking for.



How to Create and Upload Files To Your Document Library

To create a new document, head to the folder where you would like to save it. Next, click the big 'New' button in your top menu.

This will open a dropdown menu of popular Microsoft apps, including Word, Excel and PowerPoint. Choose which type of document you want to create, and the app will open in a new tab.



To upload an existing file, click 'Upload' (next to the 'New' button).

This will then give you the option to upload a file or folder directly from your machine.

How to Collaborate on a Document

IIf a document is shared with you; you will receive a notification of this in an email.

This will include a link, which will open the document in your web browser.

Once opened, click 'Edit Document' and 'Edit in Browser'.

If anyone else is editing the document, you will see that they are present and their name will appear.

How to Share a Document

To share a document, go to the document you wish to share and right click to bring up some options.

Navigate down to 'Share'.

This will allow you to specify the email address that you wish to share the document with.

Alternatively, you can click 'Copy Link' or 'Outlook' button at the bottom of the window.

Copying the link allows you to paste into a doc, email or Teams message.

Check Out Our Other Useful Guides

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