

MICROSOFT SHAREPOINT QUICK REFERENCE

HOW TO ACCESS SHAREPOINT

1. Open Microsoft 365 at office.com or your company portal
2. Click the SharePoint icon in the app launcher (waffle menu) at the top left
3. Select your team's site from the list of sites shown on your homepage

★ TIP: You can also access SharePoint directly from Microsoft Teams — click the Files tab in any Teams channel to view the connected SharePoint library.

FIND AND OPEN A FILE

1. Open your team site and click Documents in the left navigation menu
2. Browse the library or use the Search bar to find a specific file
3. Click the file name to open it directly in your browser — no download needed
4. Edit and close Changes are saved automatically as you work

★ TIP: Use the Search bar at the top of SharePoint to find files across all sites — not just the one you're currently viewing.

UPLOAD A FILE

1. Navigate to your team's Documents library
2. Click Upload at the top of the page
3. Select Files and choose the file from your computer
4. The file uploads instantly and is immediately available to everyone with site access

★ TIP: No more emailing attachments. Uploading to SharePoint means your team always has the latest version in one place.

SHARE A FILE

1. Right-click the file you want to share in the Documents library
2. Select Share from the dropdown menu
3. Enter a colleague's name or email in the search field
4. Set permissions: Choose Can edit (they can make changes) or Can view (read-only)
5. Add an optional message then click Send
6. Your colleague receives a link and can open the file immediately — no VPN or file path needed

★ TIP: Sharing a link is always better than attaching a file to an email — everyone works from the same version with no version confusion.

For IT support, search the
Knowledge Base in
ServiceNow.

Questions? Contact the IT
Service Desk

NOTE: If your file's confidentiality label doesn't match the SharePoint site's settings, the upload may be rejected. Check your file's sensitivity label before uploading, or contact your site owner if you're unsure which label applies.

