SharePoint 101

The Modern Experience

ADS-Shared Services SharePoint Team

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<u>Contents</u>

SharePoint Training for New Users	4
What is SharePoint Online and SharePoint 2016 and why does the state use it?	4
Knowledge Wave Videos	4
Getting Started with SharePoint Online	5
How to sign into a SharePoint Site	5
Site Navigation	6
Document Management	10
Navigating the Document Library	11
Creating a document from the Document Library	12
Edit a Document in a Document Library	13
Edit a Document in Word desktop client	14
Upload a Document to SharePoint Online	15
Sharing and Co-Authoring a Document in the Document Library	17
To Stop Sharing	19
Setting an Alert in SharePoint	21
Set an Alert on a document	21
Setting an alert on all items in a library	22
Managing alerts	23
	24
Working with Document Versions	
Working with Document Versions To Access Version History	24
To Access Version History	27
To Access Version History To Compare Document Versions	27

SharePoint Training for New Users

ADS has developed this curriculum to provide inexperienced users with fundamental knowledge to navigate SharePoint Online/SharePoint 2016 and work within a document library.

What is SharePoint Online and SharePoint 2016 and why does the state use it?

SharePoint is collaborative software that allows the user to upload and share files, lists, tasks and calendars with a wide range of people. Anyone with an internet connection and the required credentials to the State of Vermont's SharePoint environment can login to and use SharePoint Online/2016.

<u>SharePoint Online is cloud-based</u>; there are no physical servers based on premises all servers are stored in Microsoft data centers. Most of the SharePoint Sites that we administer are stored in SharePoint Online.

<u>SharePoint 2016</u> is an on-premises environment, <u>we house and maintain the physical servers on-site</u> in Shared Services. The sites that are stored on SharePoint 2016 are referred to as Anonymous or Public sites. The reason is that a user-id or password is not required to access these sites. Many of these sites are used to house public data that an agency or department feels should be available to the citizens of Vermont. These sites are often set up by an agency that wants to share the data.

One of the major reasons for using SharePoint is to help with document management. In SharePoint a document can be uploaded to a document library; others can view and work on the document without losing or accidently deleting the document. It is also a place for people to get information, for example news and announcements posted on your agency intranet.

SharePoint is compliant with many State and Federal laws regarding privacy. Storing and setting access restrictions to sensitive data is a straightforward process for the site collection administrator. Retention policies and classification of documents can easily be set and monitored.

SharePoint Online and SharePoint 2016 are accessible from any internet connection. A site collection Administrator or Owner can provide access to a SharePoint site by adding External Users. Anyone who has been granted permission via the external user process can access our SharePoint environment. As an example; if a contractor or non-state employee requires access to a document library it can be granted if the external partner has an O365 or Microsoft Live account. Access is not restricted to State of Vermont employees.

All the screen shots were made using the Microsoft Edge browser running in a Windows 10 desktop environment.

Knowledge Wave Videos

The State of Vermont has contracted through Knowledge Wave to provide free O365 training for all state employees. You can view all these videos by going to <u>www.knowledgewave.com</u> and setting up an account using your state email address. In addition to videos, Knowledge Wave also has monthly webinar offerings that are available once you have created an account.

Getting Started with SharePoint Online

How to sign into a SharePoint Site

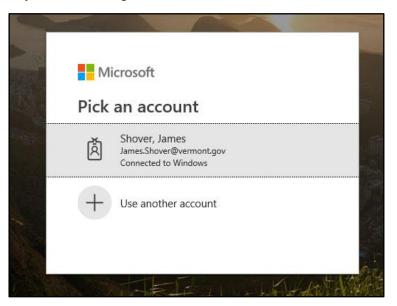
You can access a SharePoint site several ways.

- You can sign in by Microsoft Portal, type the URL into your browser address bar, have a link sent to you in an email or once you have been to the site you can create a bookmark.
- You can also go to the Portal which is at <u>https://login.microsoftonline.com</u>
- If someone has sent you a link to a site, you can click on it and if you have been given access to the site, you will be presented with a logon screen. Once you have logged into the site, you can create a shortcut to it.
- The most likely way you are going to get to the site for the first time is for someone to send you an email with the link to the site. Once you have opened the email, and you trust the sender, you can click on the link. The link for SharePoint Online sites will always start with https://vermontgov.sharepointSharePoint.com/sites or /teams, and for SharePoint 2016, it will be https://outside.vermont.gov/

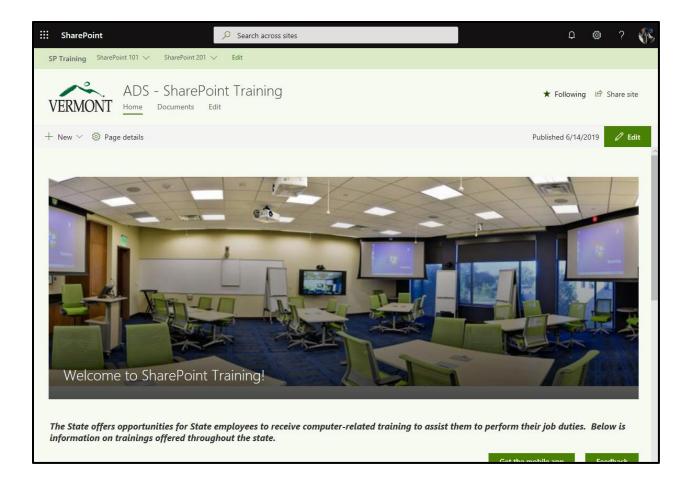
Today we are going to use the following link:

https://vermontgov.SharePoint.com/sites/training/sp101

Once you are at the site you will see a logon screen that looks like this:

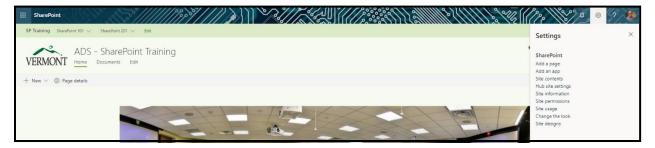


- 1. Select account (Use another account) your username will be Training@vermont.gov
- 2. Enter the password provided by the instructor.
- 3. Click on Sign In, you may be asked if you want to stay logged in, it does not matter how you answer that question.
- 4. You should see the following screen:

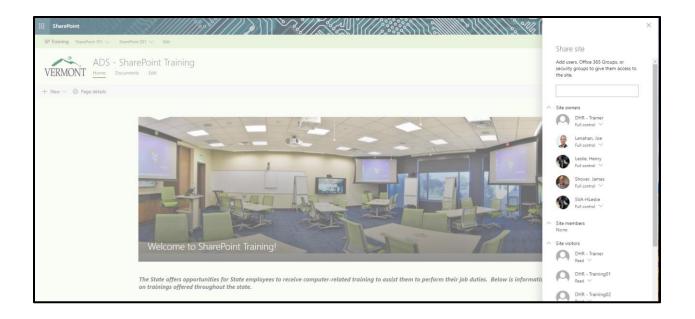


Site Navigation

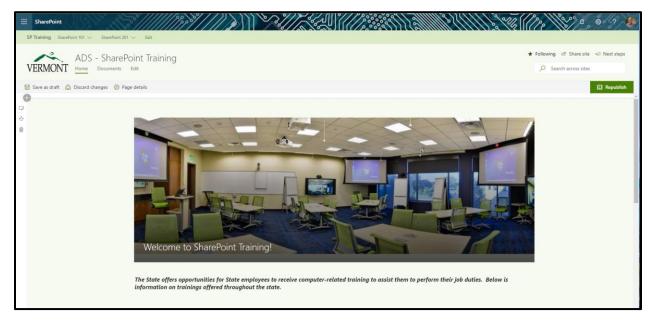
1. Select the Settings "Cog" in the upper right corner, the drop-down menu shown will appear:



2. Select "Share site" on the drop-down menu to see the following dialog box below (page 6). It will show who is sharing the site (has access), will give the option to invite people to the site, allows the user to email other site members, and (under the advanced selection) provides the ability to manage site permissions.



3. If "Edit page" is selected from the horizontal ribbon bar the page will enter the edit mode shown below. This function allows the user to edit the look of the page as well as other attributes. This topic will not be covered in SharePoint 101.



4. Selecting "Add a page" from the drop-down menu will result in new page being added as seen below. This allows the user to generate additional pages on the SharePoint site/sub-site.

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E Save as draft Page details Name your page Shover, James Tr Sprems Advisor II	Publish
•	
Comments or Add a comment. Type @ to mention someone Post	

Adding pages is outside the scope of this lesson and will not be discussed at this time.

5. Apps (applications) can be added by selecting "Add an app" from the drop-down. Apps are addins to a SharePoint site and can be lists, applications, calendars, libraries and a host of other available options.

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	Apps you can add	Newest Name	5	muhimbi				
	Lightning Conductor – SharePoint Content Roll from Lightning Tools App Details	OneSpan Sign for SharePoint Online from OneSpan App Details	conceptClassifierApp App Details	Muhimbi PDF Converter for SharePoint Online from Muhimbi Ltd App Details				
	*							
	Esri Maps for SharePoint from Esri Online, Inc App Details	App Details	Calendar App Details	Custom List App Details				

Adding apps is also outside the scope of this lesson and will not be detailed at this time.

6. By selecting "Site contents" from the right hand drop-down the entire site and sub-site contents can be viewed in an icon format.

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Contents	Subsites				
۵	Name	Type	Items	Modified	
5	Documents	Document library	2	5/23/2019 8:43	
10	Form Templates	Document library	0	5/22/2019 12:51	
6	Site Assets	Document library	8	6/5/2019 13:18	
18	Style Library	Document library	0	5/16/2019 4:08	
	Events	Events list	7	5/22/2019 15:13	
	Site Pages	Page library	1	7/16/2019 10:29	

The last remaining selections from the drop-down menu, "Hub site settings", "Site information" "Site Usage" and "Change the look" will not be reviewed at this time.

Document Management

Users spend most of their time in SharePoint working with documents that have been uploaded to a site. Users may need to upload, download, read, update or delete documents and files. A Contributor to a site can do all these things.

The Left Navigation Bar displays DHR - Training01 through DHR - Training11 If you look at the top of your monitor, you will see that you are at a workstation that starts with DHR – Training, followed by a number.

From the left-hand navigation bar, select the document library that corresponds to the user account that you are signed in as; DHR-Training01, etc. Your screen should now look similar to the following;

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DHR - Training11				Drag files here			
Site contents							
Recycle bin							
Edit							

This view of the document library is the "Modern Experience" and is generally referred to as the Modern View.

The left navigation bar is configured by the Site Collection Admin/Owner. It usually has the most popular items that the user needs access to on the site. The bar can also be permissioned so that users who come to the site may see something different depending on access rights.

In SharePoint terminology everything is a List. Document Libraries, Task Lists and calendars are all considered lists.

Within document libraries you can upload, download, read, edit, or delete documents. All of these can be accomplished by a user who has the "Contribute permission level" in the Members SharePoint Group.

Permissions are one of the responsibilities of the Site Collection Administrator or Owner and are not something that ADS - Shared Services is normally responsible for. A user can have Full Control, Contribute, or Visitor permission levels. In this class you have been given Contribute permissions to the site, meaning that you can do most things, but not make configuration changes or delete the site.

Most people using SharePoint have Contribute permissions.

Navigating the Document Library

The diagram below illustrates the modern view of the SharePoint online document library.

- 1. On the left is the document library navigation bar (quick launch). The navigation bar will have links found on the site; these can include documents, lists, tasks, calendars and any other elements on the site.
- 2. Across the top are the search window, ribbon bar and ellipses (top navigation area).

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DHR - Training03		All Documents
DHR - Training04		Save view as
DHR - Training05		Edit current view
DHR - Training06		Format current view
DHR - Training07		
DHR - Training08		
DHR - Training09		
DHR - Training10		
DHR - Training11	Drag files here	
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Recycle bin		
Edit		

3. The top right is the drop-down navigation which many pertains to views, a filter button and an information button. Selecting "Tiles" will change the document library view, see below.

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Creating a document from the Document Library

- 1) From the Ribbon Bar select +New
- 2) From the resulting drop-down menu select Word document

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DHR - Training10 DHR - Training11		
Site contents		
Recycle bin Edit		

3) This will generate the following view:

w	Word Online	Sharepoint 101 > DHRTraining	J 09	Docun	n ent - Saved			Shover, James
File	Home Insert	Page Layout Review	View 🛛 🖓 Tell me what ye	ou want to do Edit in Wor	d			🖄 Share 🖓 Comments
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- 4) This is a <u>Word Online document</u>. It appears similar to the desktop version of Word with the tabs across the top, the top navigation, and the familiar ribbon bar. On the navigation bar, you will notice **Document Saved**. The word "**Document**" is the name of the document. The document name can be changed several ways.
 - Double click on "Document", it will highlight, and you can change the name of the document
 - Select the "File" tab and then "Save As"
 - Right Click on the document in the document library and select "Rename"
 - Click on the Ellipses and select "Rename" or,
 - Select "Rename" from the Ribbon Bar in the document library when the document is highlighted

w	Word Online Jir	m Shover > Shared Documents	Sample Text SP101 - Saved		Shover, James
File	Home Insert	Page Layout Review View Q Te	me what you want to do Edit in Word	🖄 Share	Comments
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Undo	Clipboard	Font	Paragraph 😼	Styles 17	Editing

- 5) As edits are made to the file the word Saved will change from Saved to Saving. While editing in the browser every change is saved automatically as they are made.
- 6) Selecting the name of the document library on the top ribbon bar of Word will take the user back to the document library.

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DHR - Training04	How to create a calender.docx	14 minutes ago	Shover, James		
DHR - Training05	Resource Guides ODFB_SharePoint.docx	14 minutes ago	Shover, James		
DHR - Training06	Sample Text SP101.docx	A few seconds ago	Shover, James		

7) The file that was created will be displayed in the library by the proper name.

Edit a Document in a Document Library

1. When a file is created, SharePoint creates the document in the edit (browser) mode using the application required. When the document has been closed and is re-opened it is viewable in the edit mode.

w	Word Online	Home > Documents	P101 Outline - Saved		Shover, James	
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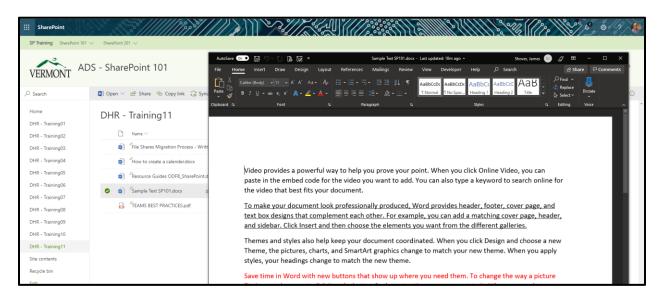
Edit a Document in Word desktop client

Highlight the document in the document library. Notice the top navigation ribbon will change appearance providing the different options available. Notice the additional ellipses at the right.

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DHR - Training07 DHR - Training08	TEAMS BEST PRACTICES.p	Open >	ago Shover, James			
DHR - Training09		Share				
DHR - Training10		Copy link				
DHR - Training11		Download				
Site contents		Delete				
Recycle bin		Rename				
Edit		Pin to top				
		Move to				
		Copy to				
		Version history				
		Alert me				
		More >				
Return to classic SharePoint		Details				

Right click on the highlighted document.

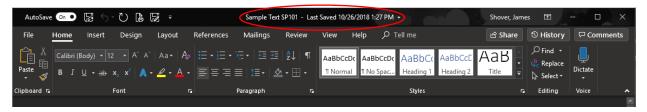
Observe the vertical drop-down menu and the options. Select Open > Open in Word. The word client should open your document and it should look similar to view below.



- 1. Enter additional text into the Word document. The upper left corner should display and AutoSave selective slider and should be On.
- 2. As text is entered the rotating arrow and text will show the document saving.
- 3. The center of the bar will have the document name, "Saved to SharePoint" as depicted below.



4. When the document is closed and reopened in the client the center bar will have the document title, "Last Saved date and time"



- 5. Selecting the "carrot" next to the last saved date and time will activate a drop-down menu with the name, location, version history and the ability to send a link.
- 6. Select "Save As" and save the document to the desktop, close word and return to the document library.

Upload a Document to SharePoint Online.

1. Select "Upload" from the ribbon

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Home DHR - Training01 DHR - Training02	DHR -	Files Folder Template	Modified 🗸	Modified By ~~	+ Add column	
DHR - Training03	0	^J File Shares Migration Proc	ess - Written.docx 28 minutes ago	Shover, James		

2. Select Files to bring up an explorer window

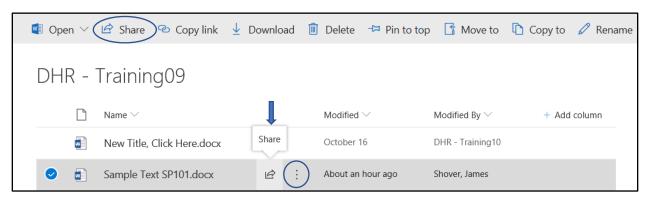
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R - Training03	File Shares Migration Process - Written.docx	Vester 🖈 Quick access	Attachments	Status	Date modified 10/16/2018 2:03 PM	Type File folder	Size		
R - Training04	How to create a calender.docx	Yester Vermont Vester	Documents Notebooks	8	7/17/2019 8-42 AM 5/13/2019 9-25 AM	File folder File folder			
२ - Training05	Resource Guides ODFB_SharePoint.docx	Vester Documents	Pictures SharePoint Dev	0 0	4/4/2019 7:30 AM 1/9/2019 8:29 AM	File folder File folder			
R - Training06 R - Training07	Sample Text SP101.docx	Vester Pictures	SharePoint Powershell_ect Training	O R	5/14/2019 9:14 AM 7/16/2019 1:22 PM	File folder File folder			
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R - Training09		Training	James @ State of Vermont ODFB Migration Email.docx	0	5/16/2019 10:51 AM 7/11/2019 11:29 AM	Internet Shortcut	1 KB		
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t - Training11		ADS - File Shares Migration Team -							
contents		3D Objects							
ycle bin		Desktop							
		Documents							
		Music							
		Pictures							
		Videos							

- 3. Select a document saved to the desktop, OneDrive or whatever source you need. The "File name" will populate. Select "open" and the document will be uploaded to the document library and will now display.
- 4. The Procedure for uploading multiple documents is identical to uploading a single document.

Sharing and Co-Authoring a Document in the Document Library

Co-Authoring is the process of sharing a file with another user to enable editing of the file by both parties simultaneously or individually.

- 1. Highlight the required file(s) in the document library
- 2. Select "Share" from the ribbon bar or select the share icon. This function can also be accessed by a right-click on the highlighted document.

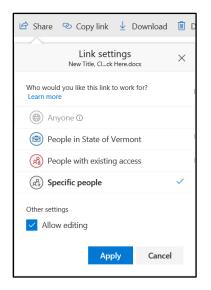


3. This will bring up a dialog box where you can enter the name of the person you would like to share the file with. The file can also be shared with multiple people in the same way.

🖻 Share 🐵 Copy link 🞍 Download 📋 [
Send Link ···· × New Title, CLck Here.docx
Only the people you specify who have this link can edit.
Enter a name or email address
Add a message (optional)
Send
20
Copy Link Outlook

4. Enter the name(s) or email address(es). The text area will automatically populate with names in your organization. A message of up to 500 characters can also be added. Select "Send"

5. Selecting "Only the people you specify who have this link can edit" will bring up the following dialog box.



6. The person you shared the file with will get an email with a link to the file. The email will look like this:

Here's the document that Shover, James shared with you.
A This link only works for the direct recipients of this message.
Sample Text SP101
Microsoft OneDrive
Microsoft respects your privacy. To learn more, please read our <u>Privacy Statement.</u> Microsoft Corporation, <u>One Microsoft Way, Redmond, WA 98052</u>

- 7. Select Open to open the document.
- 8. The document will open in non-edit mode.
- 9. Select Edit Document in the upper right-hand corner and select Edit in Word.
- 10. When the document is open by two (or more) people the cursor will appear different. The cursor is shaped differently and is red. If there are several people editing the document, each will have a separate color. This indicates co-authoring the file.



11. If the document is open by the user, when a second user starts to edit the document you will see their name(initials) pop up in the upper right-hand corner.



- 12. The D in the circle correlates to DHR-06. If the first person were editing the initials would reflect that user.
- 13. When the second person is typing, their name will be displayed:

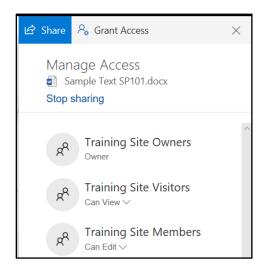


To Stop Sharing.

- 1. From the Document Library, select the file that you want to stop sharing.
- 2. Select Share from the menu.
- 3. This will bring up the sharing dialog box; from the ellipses select "Manage Access".

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DHR -	Send Link ···· ×
Ľ	Conly the people you specify who have this link can edit.
 	ctober 16 I Enter a name or email address days ago S
	Add a message (optional) ctober 22 5
	Send
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	Copy Link Outlook

4. Select the person(s) that you wish to stop sharing the document with and then select "Stop sharing"



5. This will display a second dialog (a warning to <u>make sure</u> you want to stop) **Stop Sharing, select** "**Stop sharing**" again.

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		Name 🖂		×	+
	w	New Title, Click H	Stop sharing?		
0		Sample Text SP1(This will delete all links giving access to this item and remove all people with direct access except for owners.		
		SharePoint 101 E	Stop sharing Cancel		
				_	

6. When Stop Sharing is selected, the owner of the document will be the only one that has access to the document.

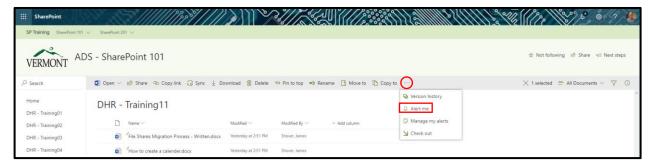
Setting an Alert in SharePoint

Alerts can be used to let the user know when a change has been made to a library, document or list. Alerts cannot be set sitewide. You can't set individual alerts on non-Office (for example, PDF) documents.

Log into Outlook (web/client) to observe Alert notifications when they are set.

Set an Alert on a document

- 1. Select the document to set an alert on from the document library.
- 2. Select the ellipses, then select "Alert me".



2. The "Alert me" selection will open up the following settings dialog:

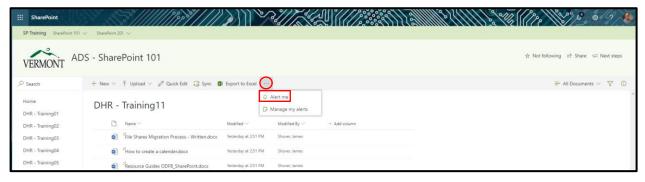
::: SharePoint				1112311111299	ly (1 m) 2 0 1 4
SP Training SharePoint 101	✓ SharePoint 201 ✓				
VERMONT AL	DS - SharePoint 1	Alert me when items change		×	☆ Not following ビ Share < Next steps
	👩 Open \vee 🖻 Share	Alert Title		OK Cancel	\times 1 selected \equiv All Documents \vee ∇ \bigcirc
Home DHR - Training01	DHR - Trainin	Aner: The Enter the title for this alert. This is included in the subject of the notification sent for this alert.	DHR - Training11: Sample Text SP101.doc		
DHR - Training02	🗋 Name 🗠	Send Alerts To You can enter user names or e-mail addresses.	ange		
DHR - Training03	File Shares M	Separate them with semicolons.	<u>Shover, James</u> x		
DHR - Training04	How to crea	Delivery Method			
DHR - Training05	Resource Gu	Specify how you want the alerts delivered.			
DHR - Training06	⊘				
DHR - Training07 DHR - Training08	TEAMS BEST		 Jeno Orc in text message (Jmo) 		
DHR - Training09		Send Alerts for These Changes Specify whether to filter alerts based on specific criteria. You may also restrict your alerts to only			
DHR - Training10		include items that show in a particular view.	Someone else changes a document		
DHR - Training11					
Site contents		When to Send Alerts			
Recycle bin		Specify how frequently you want to be alerted. (mobile alert is only available for immediately send)			
Edit			Send a weekly summary Time:		
				OK Cancel	

- 3. Enter alert parameters into the boxes as required:
 - a. Enter a name for the alert
 - b. Designate users to receive the alert
 - c. Delivery method will always be E-mail
 - d. Specify the type of changes to send the alert for
 - e. Specify when to send the alerts

- f. Select ok
- 4. Check your email; there should be an email notifying an alert has been setup for that document.
- 5. Edit the document and verify receipt of an alert email when changes are made.

Setting an alert on all items in a library

1. Select the ellipses on the ribbon and then select "Alert me".



2. The "Alert me" selection will open up the following settings dialog:

SP Training SharePoint 1	101 - SharePoint 201 -			1111){\$1/////{\$1	
VERMONT A	ADS - SharePoint 1	Alert me when items change		×	$\frac{1}{27}$ Not following $\ {\rm M}^2$ Share $\ {\rm Next steps$
,O Search	+ New 🗸 👎 Upload 🕤	Alert Title		OK Cancel	≕ All Documents ∨ 🕎 🛈
Home DHR - Training01	DHR - Trainin	Enter the title for this alert. This is included in the subject of the notification sent for this alert.	DHR - Training11		
DHR - Training02	🗋 Name 🗸	Send Alerts To You can enter user names or e-mail addresses. Separate them with semicolons.	Users: Shover, James x		
DHR - Training03	File Shares P	separate them with semicolons.	alliversi casirisa *		
DHR - Training04 DHR - Training05	How to crea	Delivery Method Specify how you want the alerts delivered.	Send me alerts by:		
DHR - Training06	Sample Text		E-mail James.Shover@vermont.gov Text Message (SMS) Send URL in text message (SMS)		
DHR - Training07 DHR - Training08		Change Type	is Sena Unc in text message (sins)		
DHR - Training09		Specify the type of changes that you want to be alerted to.	Only send me alerts when:		
DHR - Training10 DHR - Training11			 New items are added Existing items are modified Items are deleted 		
ite contents			Witems are detered		
Recycle bin		Send Alerts for These Changes Specify whether to filter alerts based on specific oriteria. Now may also retrictly your alerts to only include items that show in a particular view.	Send me an alert when: (#) Anything changes () Someone else changes a document () Someone else changes a document least modified by me () Someone else changes a document last modified by me		
		When to Send Alerts Specify how frequently you want to be alerted. (mobile alert is only available for immediately send)	Send notification immediately Send a daily summary		

- 3. This dialog is almost identical to the document alert setup page except the alert is for the entire library. The major difference is the "Send Alerts for These Changes" section.
- 4. Make the required changes desired and then select "OK" for the changes to take effect.

Managing alerts

To manage alerts, select "Manage my alerts" after selecting the ellipses. The process is the same for managing library or individual document alerts.

SharePoint SP Training SharePoint	01 ~ SharePoint 201 ~))) (¢		<u>.</u>	
VERMONT A	ADS - SharePoint 101				핫 Not following 11한 Share 🤤 Next ste
,∕⊃ Search	+ New 🗸 🗟 Upload 🗸 🖉 Quick Edit 🔓 Sync 🕼	Export to Excel			\equiv All Documents \sim $~$ ∇
Home DHR - Training01	DHR - Training11	0	Q Alert me ☑ Manage my alerts		
DHR - Training02 DHR - Training03	Name ∨ Image: Second state of the st	Modified \checkmark Vesterday at 2:51 PM	Modified By \sim	+ Add column	
DHR - Training04 DHR - Training05	How to create a calender.docx *Resource Guider ODER SharePrint docx	Vesterday at 2:51 PM	Shover, James		

The user can change or delete existing alerts.

In addition, any time the user receives an alert via email, it will contain a link that allows them to modify any alerts for that site. When the link is selected, the user can view all of the alerts for that site and delete or edit them.

III SharePoint	
	Q swar & roution (2)
~	✓ EDIT UNKS
VERMONT	My Alerts on this Site ∞
Home DHR - Training01	W Add Alert X Delete Selected Alerts
DHR - Training02 DHR - Training03	Aiet file
DHR - Training04	There are currently no alerts to display.
DHR - Training05	
DHR - Training06	
DHR - Training07	
DHR - Training08 DHR - Training09	

Working with Document Versions

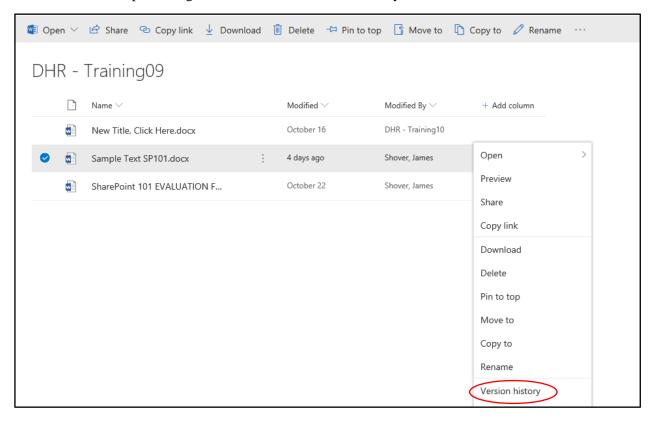
Version history is activated by default when a site or Library is created. SharePoint default settings will keep up to 500 Major Versions; if the Site Collection Administrator or Owner also activates Minor versions, then SharePoint will keep 511 minor versions unless otherwise specified.

Version History can be activated for Major versions, documents published to the site for public consumption. It can also be activated for minor versions, updates and edits that are made to major versions of a document. These (minor versions) are usually not published; the Site Collection Administrator or Owner can decide who has access to minor versions via permission settings.

The Site Collection Administrator/Owner should configure the number of Versions that are kept to a manageable amount, this will also lower storage space requirements.

To Access Version History

- 1. Select a document in your library.
- 2. Select the ellipses or right-click and select "Version history"



3. When Versioning is turned on for the document library the Version History button is available; when the user selects it, they will see a screen like the one below.

)HR - T	Version history				
<u> </u>	Delete All Versions				
	No. ↓ Modified	Modified By	Size	Comments	
	5.0 10/26/2018 10:27 AM	Shover, James	23 KB		
	4.0 10/22/2018 8:17 AM	Shover, James	20.1 KB		
	3.0 10/22/2018 8:12 AM	Shover, James	20.1 KB		
	2.0 10/22/2018 8:01 AM	Shover, James	21.2 KB		
	1.0 10/22/2018 7:17 AM	Shover, James	21.2 KB		

CAUTION: The user has the ability to delete all versions.

- 4. The user will be presented with a list of the current versions, the date and time they were created, who they were created by, the file size and any comments that were entered by the author(s).
- 5. Hovering the cursor over the most current modified version will highlight a box around the text; selecting the "carrot" will display two options, View and Restore.

Versi	Version history								
Delete	Delete All Versions								
No.↓	Modified	Modified By	Size	Comments					
2.0	10/16/2018 6:00 AM	DHR - Training10	17.3 KB						
1.0	View	DHR - Training10	16.9 KB						
	Restore								

Selecting View will enable the user to see some information about the document. It also allows the user to access other functionality from the resulting "View" tab that looks like a shortened version of the Ribbon from the classic view of the Document Library.

DHR - T	Version history	×
	VIEW	
	Image: Weission History Image: Alert Me Image: Shared With Image: Alert Me Edit Image: Alert Me Item Image: Alert Me Out Image: Alert Me Item Image: Alert Me Item Image: Alert Me Out Image: Alert Me	
	Manage Actions	
	Name New Title, Click Here.docx	
	Title	
	Version: 2.0 Close Created at 10/16/2018 5:55 AM by DHR - Training10 Last modified at 10/16/2018 6:00 AM by DHR - Training10	

6. Hovering the cursor over an older version will highlight a box around the text; selecting the "carrot" will display three options, View, Restore and Delete.

Modified By	Size	Comments
DHR - Training10	17.3 KB	
DHR - Training10	16.9 KB	
	DHR - Training10	DHR - Training10 17.3 KB

If you select "Restore" of one of your version history documents, it will write over what is in the document library, if it is not the latest version number.

Selecting "Restore" on the latest version will prompt the following message:

Version history			
Delete All Versions			
No. 4 Modified	Modified By	Size	Comments
2.0 10/16/2018 6:00 AM ·		× ^{,3 KB}	
1.0 10/16/2018 5:59 AM	This site says	. <mark>9 КВ</mark>	
	Cannot restore the current version.		
	0	к	

7. A user cannot delete the latest version; however, the user can delete older versions.

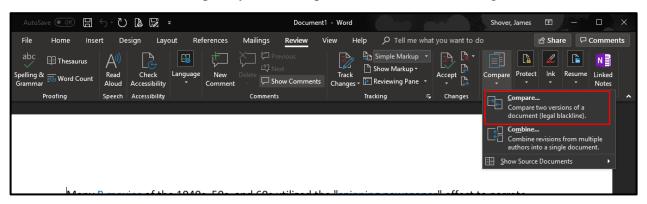
To Compare Document Versions

To Compare two or more documents the user will select the document from the document library and then Version history as outlined above (A document must have at least 2 or more versions).

1. From the Version History screen, select the lowest numbered version. The document will open in Word. The ribbon bars will look like the document below.

AutoSav	/e 💿 off			- -		Sample Text SF	9101 - backu	p version	- Read-Or	nly - Word	4	Sho	ver, Jame	s 🖻	- 0	×
File	Home	Insert	Design	Layout	References	Mailings	Review	View	Help	Ю Tell	me what you war	it to do				nents
Paste			$\begin{array}{c c} & \bullet \\ \hline 2 & \bullet \\ \hline \mathbf{x}_2 & \mathbf{x}^2 \end{array} \mathbf{A}^* \mathbf{A}^* \\ \hline \mathbf{x}_2 & \mathbf{x}^2 \end{array}$			'≣ - = = ≡ ‡≣ - ≰	≙↓ ¶ 1 - ⊞ -	AaBbCo 1 Norm			ABbC(AaBb leading 1 Headin			P Find → \$\$C Replace \$ Select →	Dictate	
Clipboard	<u>.</u>		Font		<u>s</u>	Paragraph	G.				Styles		G.	Editing	Voice	^
PREVIOU	S VERSION	To make t	this previous v	version becor	ne the latest ver	sion, click Restor	re. Con	npare	Restore							
				f + h = 10	10- 50-		د ام م مثلاً ف									
	IVI	any <u>B n</u>	novies o	f the 19	40s, 50s,	and bus l	itilized t	ne s	inning	<u>g news</u>	spaper" effe	ect to ha	rrate			

- Notice when Word opens that the menu bar title reads "... backup version Read Only – Word"
- 3. The ribbon bar directly above the text area provides the user with two options, Compare and Restore, select Compare, you will be presented with the following view.



4. Select "Compare..." on the menu bar in the Compare dropdown window.

- 日 ち・ひ 🔓 🖾 AutoSa File Design View Help 암 Share 🛛 🖓 Comments Layout Mailings Review Simple Markup L. ſ. N Thesa 🖹 Sho Nev Linked Notes Check Track Word Count C Show Comments F Reviewing Pane Changes Accessibility Speech Accessibility Changes Compar OneNote Comments Tracking Compare Documents ? × Original document Revised document Lab<u>e</u>l changes with Label changes with Many <u>B movies</u> of the 1 fect to narrate ÷ important plot points th earance of a More >> OK Cancel realistic front page, whi d several smaller headlines used as filler. A large number of these spinning newspapers included stories titled
- 5. The user will then be presented with the following screen:

- 6. The Original Document is going to be the one that is currently open. Select the dropdown and scroll through the list until you find the document name.
- 7. The Revised Document is going to be the document named [DocumentName].docx as an example:

	Compare Documents	? :	×
	<u>O</u> riginal document	Revised document	
	Sample Text SP101 - backup versic 🗸 🧀	SampleDoc_SP101.docx 🗸 🗸	
the 1	Lab <u>e</u> l changes with	Label changes with Shover, James	ifect
nts tl		↔	eara
, wh	<u>M</u> ore >>	OK Cancel	d se

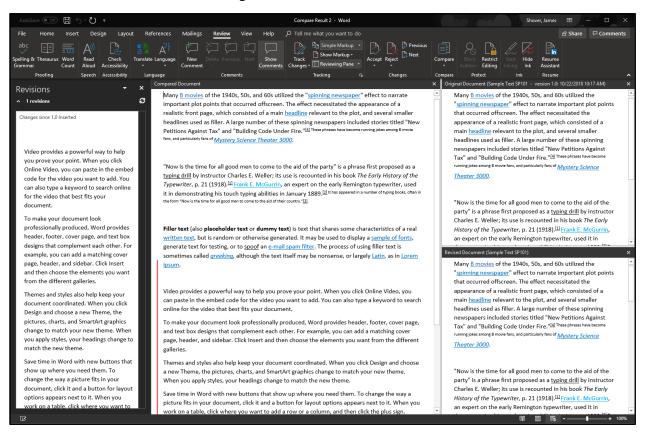
iller. A large number of these spinning newspapers included stor

8. Select OK, you will see the following dialog box.

Microsof	Word		×
?	One or both of the compared documents contain tracked changes. For th	e purpose of the comparison, Word will consider these changes to have been accepted. Continue	e with the comparison?

9. Select Yes.

10. A new word document will open that will look a lot like the previous document viewed, however it will show the changes, see below.



- 11. The screen that comes up within the Word document includes the original and revised document in the windows on the right, the changes are highlighted in the document in the center and the revision since version 1.0 is in the left window.
- 12. To exit this view, simply select the "X" on the various screens.

Deleting Versions

It is possible to delete the Version History if for some reason the owner wished to do so. As discussed above, the most recent version cannot be deleted, however all the other existing versions can be. If the user should select Delete All Versions, they will be sent to the Recycle Bin.

Prior to selecting Delete All Versions:

<u> </u>	Delete All Versions					
	No.↓ Modified 5.0 10/26/2018 10:2	77 AM	Modified By	Size 23 KB	Comments	
o 💼 :	4.0 10/22/2018 8:17		Shover, James	20.1 KB		
	3.0 10/22/2018 8:12	2 AM	Shover, James	20.1 KB		
	2.0 10/22/2018 8:01	I AM	Shover, James	21.2 KB		
_	1.0 10/22/2018 7:17	7 AM	Shover, James	21.2 KB		
_						
_						
_						
_						

After selecting Delete All Versions:

0	pen 🗸 🖻	Share 🐵 Copy link 🛓 Download 📋 Delete 🖙 Pin to top	📑 Move to 🗋 Copy to 🖉 Renam	ie	
Dŀ	HR – T	Version history			×
		Delete All Versions			
		No.↓ Modified	Modified By	Size	Comments
0		5.0 10/26/2018 10:27 AM	Shover, James	23 KB	

Notice the only version left is the most recent, the other four have gone to the recycle bin. If the user wants to retrieve these older versions, they may do so using the following procedure.

- 1. Select the site Settings Gear in the upper right-hand corner.
- 2. Select Site Contents.

3. The following screen will be presented.

SharePoint SP Training SharePoint 10	01 ~ SharePoint 201 ~	\$ <i>\\\\}</i> }\\\		
VERMONT A	DS - SharePoint 101			☆ Not following in Share 더 Next steps
, ○ Search	+ New \sim			📓 Site usage 🖒 Site workflows 🔘 Site settings 🔋 Recycle bin (0)
Home DHR - Training01	Contents Subsites			
DHR - Training02	🗋 Name	Туре	Items	Modified
DHR - Training03	DHR - Training01	Document library	0	5/24/2019 11:11 AM
DHR - Training04	DHR - Training02	Document library	0	7/16/2019 1:36 PM
DHR - Training05	DHR - Training03	Document library	0	5/24/2019 11:14 AM
DHR - Training06	DHR - Training04	Document library	0	5/24/2019 11:14 AM

4. Select "RECYCLE BIN" to view deleted files.

III SharePoint			V~!//			1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1
SP Training SharePoint	101 V SharePoint 201 V					
VERMONT A	ADS - SharePoint 101					☆ Not following 내 Share <디 Next steps
	Empty recycle bin					\equiv View options \vee
Home DHR - Training01	Recycle bin					Î
DHR - Training02	🗋 Name 🗸	Date deleted $\downarrow \smallsetminus $	Deleted by \smallsetminus	Created by $\!$	Original location \vee	
DHR - Training03	User Guide SharePoint 101.pdf	7/16/2019 1:45 PM	Leslie, Henry	SVA-HLeslie	teams/ADS-SharePoint101/Shared Documents	
DHR - Training04	Test for you.pptx	7/16/2019 1:38 PM	Leslie, Henry	DHR - Trainer	teams/ADS-SharePoint101/DHRTraining11	
DHR - Training05	101SP.docx	7/16/2019 1:37 PM	Leslie, Henry	Leslie, Henry	teams/ADS-SharePoint101/DHRTraining11	
DHR - Training06						

- 5. Notice the version numbers after the document name. These are versioned documents that you deleted from Version History.
- 6. To restore the files, select the files by checking box next to the document name, then select "Restore Selection". The user will be presented with the following screen:

S Restore Selection				
Restore Selection				(Items 1
Type Name	Original Location	Created By	Deleted4	Size
🗹 💼 Sample Text SP101.docx (1.0)	/sites/Training/sp101/DHRTraining09	Shover, James	10/31/2018 5:26 AM	22.1 KB
Sample Text SP101.docx (2.0)	/sites/Training/sp101/DHRTraining09	Shover, James	10/31/2018 5:26 AM	22.1 KB
Sample Text SP101.docx (3.0)	/sites/Training/sp101/DHRTraining09	Shover, James	10/31/2018 5:26 AM	20.8 KB
Sample Text SP101.docx (4.0)	/sites	×	10/31/2018 5:26 AM	21 KB
🗆 📫 SP101 Outline.docx	/sites		10/26/2018 11:35 AM	21.5 KB
Document.docx	_{/sites} This site says		10/26/2018 6:29 AM	24 KB
🗌 💼 JoeTest2 - Copy (4).docx	/sites Are you sure you want to resto	re these items?	10/25/2018 7:03 AM	19.7 KB
🗌 💼 Notes - Copy.docx	/sītes		10/25/2018 7:02 AM	80.6 KB
🗌 🕘 Tutorial Page.aspx	/sites OK	Cancel	10/23/2018 10:20 AM	3.5 KB
CreatingWordDocuments From SharePointLists.docx	/sites		10/19/2018 8:05 AM	109.6 KB

- 7. Select OK
- 8. Return to the document library, select the ellipses or right click on the highlighted document, select version history to confirm the files were restored.

Restore the library

- 1. Go to the SharePoint document library you'd like to restore
- 2. Select Settings > Restore this library
- 3. On the Restore page, select a date from the dropdown list, such as **Yesterday**, or select **Custom date and time**.

Restore ADS - SharePoint 101 - DHR - Training11

If something went wrong, you can restore this library to a previous time. Select a date preset or use the slider to find a date with unusual activity in the chart. Then select the changes that you want to undo.

Select a date		
Custom date a	nd time	\sim
Restore	Cancel	
Restore	Cancel	

Move the slider to quickly scroll the list to a day.

29	28	27	26	25	24	23	22	21	20	19	18	17	16	15	14	13	12	11	10	9	8	7	6	5	4	3	2	1	0
Days a																													

4. Use the activity chart and activity feed to review the recent activities that you want to undo.

Restore ADS - SharePoint 101 - DHR - Training11

If something went wrong, you can restore this library to a previous time. Select a date preset or use the slider to find a date with unusual activity in the chart. Then select the changes that you want to undo.

Select a	date	<u>.</u>																											
Custor	m da	ate ar	nd tir	ne							`	\checkmark																	
Resto	ore		С	ance	I																								
Move th	e sli	der te	o qui	ckly s	scroll	the li	st to	a da	y.																				
29 Days ago	28	27	26	25	24	23	22	21	20	19	18	17	16	15	14	13	12	11	10	9	8	7	6	5	4	3	2	1	0

ight it and all the changes before it. Then select the Res all the highlighted changes

\sim	Change		File name	
~ 2	28 days ago - 10/15/2019 (20)			
5	Restored from the Recycle Bin by unknown user 9:39:1	W	2019 fishing - Copy.docx	
Î	Deleted by DHR - Trainer 9:38:15 AM	W	2019 fishing - Copy.docx	

The daily activity chart shows the volume of file activities in each day for the last 30 days. It gives you an overview of what has happened to your library over time and can help you identify any unusual activities, such as when your files were infected by malware.

The activity feed shows individual file and folder operations in reverse chronological order. You can scroll down to see previous days, or move the slider below the daily activity chart to quickly move to a specific day.

- 5. If you're selecting a custom date and time, select the earliest activity that you want to undo. When you select an activity, all other activities that occurred after that are selected automatically.
- 6. When you're ready to restore your library, select **Restore** to undo all the activities you selected.

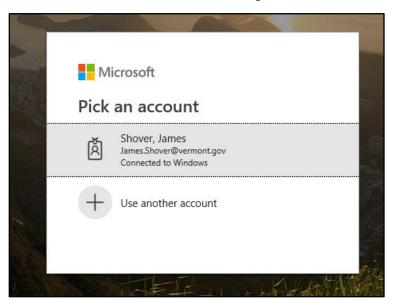
Your library will be restored to the state it was in before the first activity you selected. If you change your

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Office 365 Introduction

Microsoft Office 365 (O365) is web-based; to access O365 the user needs to log-in to the "portal".

There are two ways to navigate to the portal, open a browser and enter portal.office.com or enter <u>HTTPS://login.microsoftonline.com/</u>. Either of these will bring the user to the following screen:



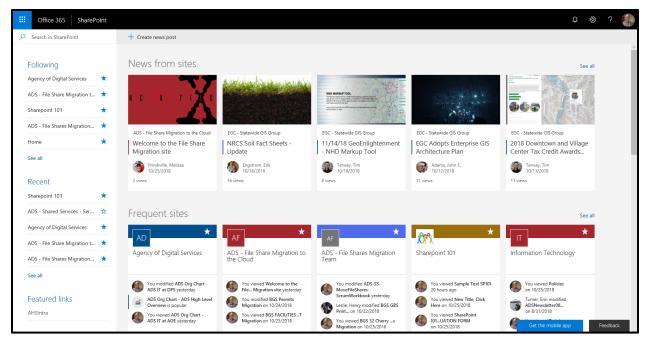
Select the account that you will use, enter your password and you will be brought to the following screen:

iii Office 365											o 🌣 ? 🝕
	Good n	norning						,₽ s	earch		
	Apps									Install Office $\ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \$	
	0	(w	x	P	N	S	1			
	Outlook	OneDrive	Word	Excel	PowerPoint	OneNote	SharePoint	Teams	Calendar		
	Explore all you	r apps $ ightarrow$									
	Documen	ts							↑ Upload and op	oen New ∨	
	Recent Pin	ned Shared	with me Di	scover						≡~	

This is the O365 landing page; under "Apps" are a list of the office applications that the user is authorized access to. The user can select any of the apps to use them. As an example, if the user were to select "Excel" the following screen (next page) would display:

Excel Online			
Welcome to Excel		,∕⊂ Search	
New		New workbooks sav	ed to: 🜰 OneDrive 🛛 Hide templates 🔿
+ Take a tour		Increase Names)	
New blank workbook Welcome to Excel Any year custom	n calendar Personal monthly budget	Simple service inv	oice Agile Gantt chart
			More templates $ ightarrow$
Recent Pinned Shared with me Discover			$\overline{\uparrow}$ Upload and open \equiv ~
Name	Last opened by you	Sharing Activity	
ADS-SS-MoveFileShares-ScrumWorkbook teams * * Shared Documents * SCRUM	Yesterday at 7:46 AM	g ^R Shared 🖉 Lena	han, Joe edited yesterday at 9:55 AM
BGS FACILITIES WEST Migration sites » » ADSFileShareMigration » BGSFileShareMigration	Thu at 7:35 AM	\mathfrak{A}^{R} Shared	
BGS 32 Cherry St Reports Migration	Thu at 7:33 AM	g ^R Shared	

From this view the user would then have the ability to select a new blank Excel workbook or templates. The user could also select any files and open them in the Online or Client versions of Excel.



If the User selects SharePoint from the landing page the following screen will appear:

The SharePoint landing page in O365 will allow the user to manage their experience via "Follow" and "Recent" which are located in the left-hand navigation bar/window.

This window will display sites that the user has marked to "follow" so they will be continuously pinned to the left-hand navigation bar. Additionally, sites that have been visited recently or multiple times will display under "recent" in the left-hand navigation bar.

Office 365 provides the user "anywhere/anytime" access to their apps and files with via an internet connection. Office 365 apps can also be installed and accessed by the user via smart phone.

This concludes the SharePoint 101 New User introduction.