

SharePoint 101

The Modern Experience

ADS-Shared Services SharePoint Team

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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.

SharePoint Online is cloud-based; 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.

SharePoint 2016 is an on-premises environment, we house and maintain the physical servers on-site 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 accidentally 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 www.knowledgewave.com 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

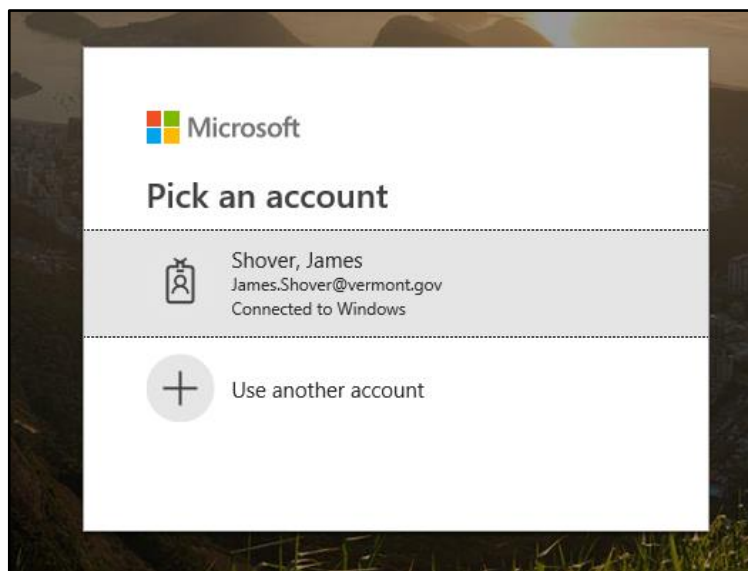
You can access a SharePoint site several ways.

- 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 <https://login.microsoftonline.com>
- 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.sharepoint.com/sites> or /teams, and for SharePoint 2016, it will be <https://outside.vermont.gov/>

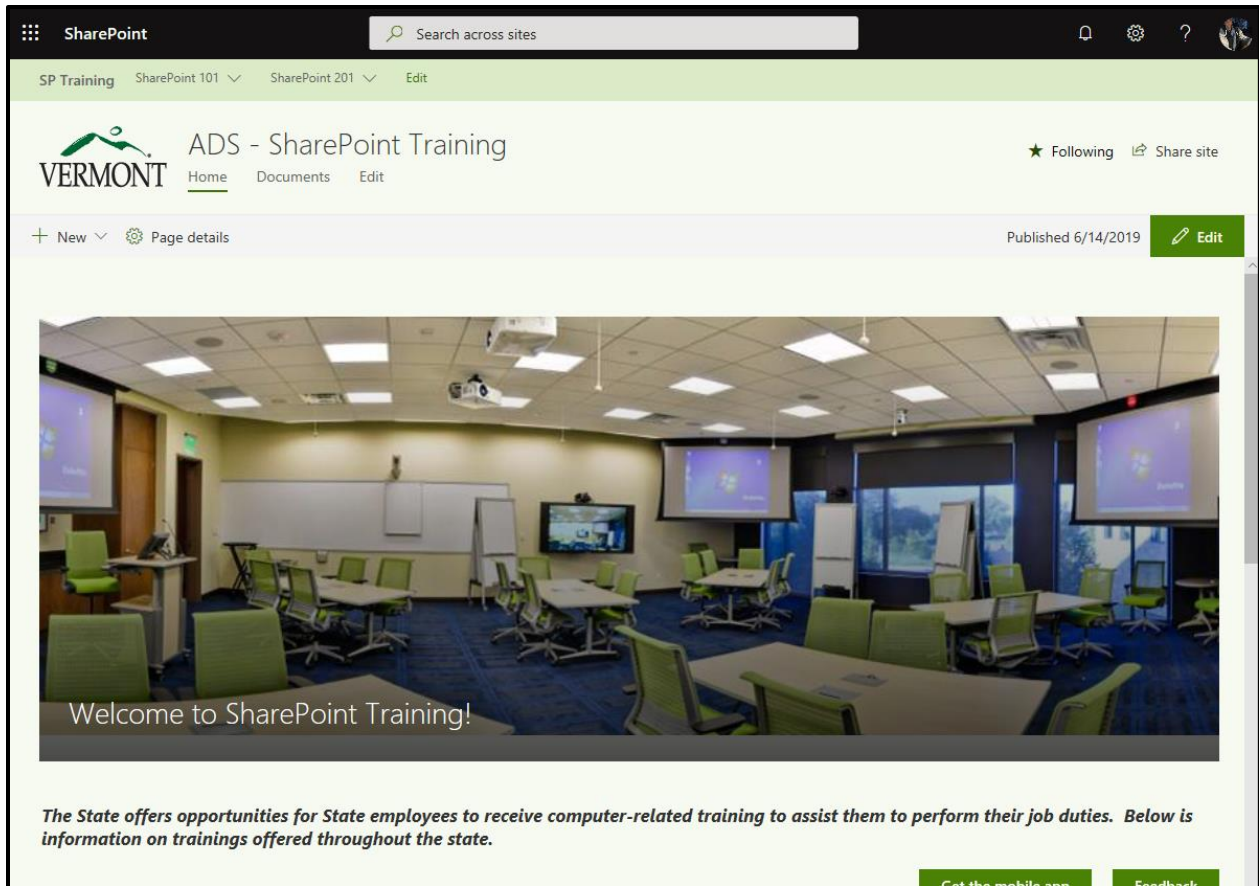
Today we are going to use the following link:

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

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

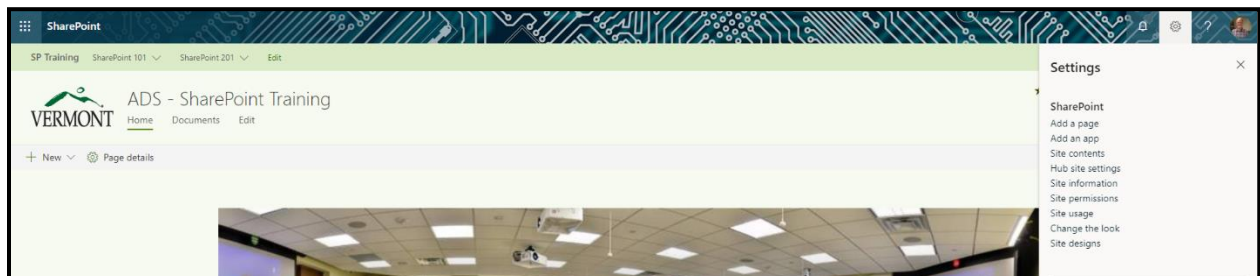


1. Select account (Use another account) your username will be Training@vermont.gov
2. Enter the password provided by the instructor.
3. Click on Sign In, you may be asked if you want to stay logged in, it does not matter how you answer that question.
4. You should see the following screen:

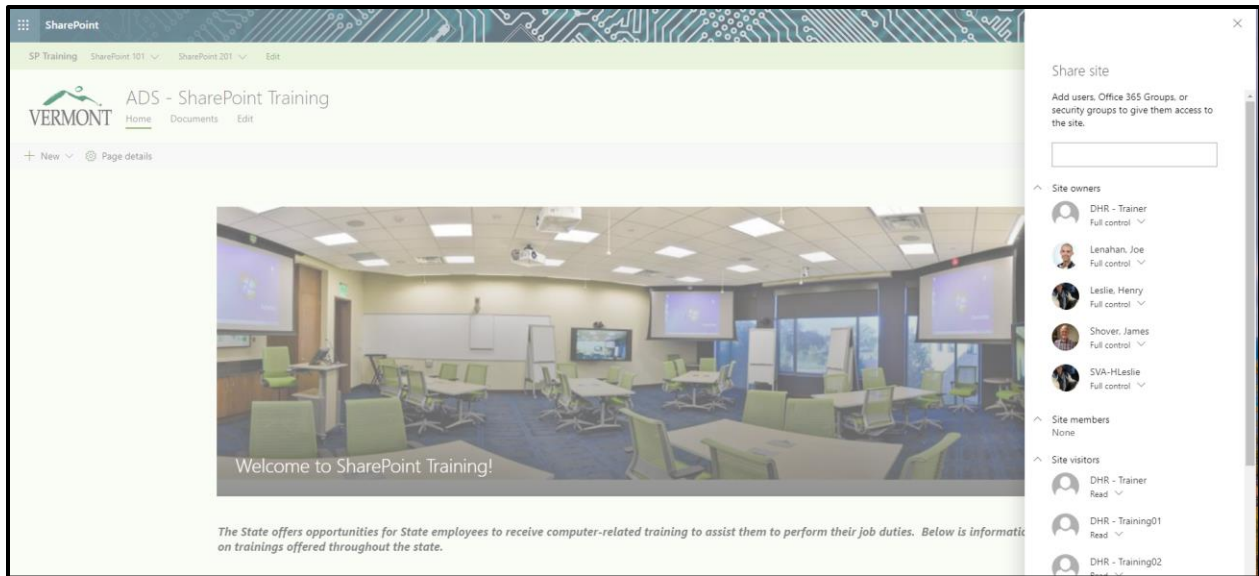


Site Navigation

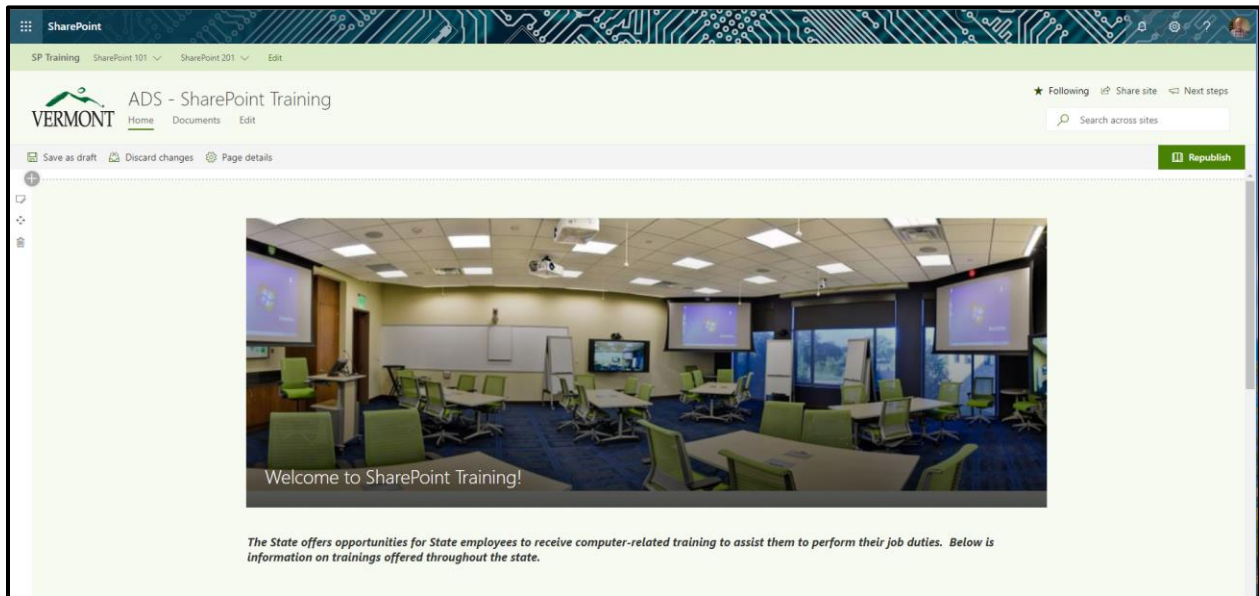
1. Select the Settings “Cog” in the upper right corner, the drop-down menu shown will appear:



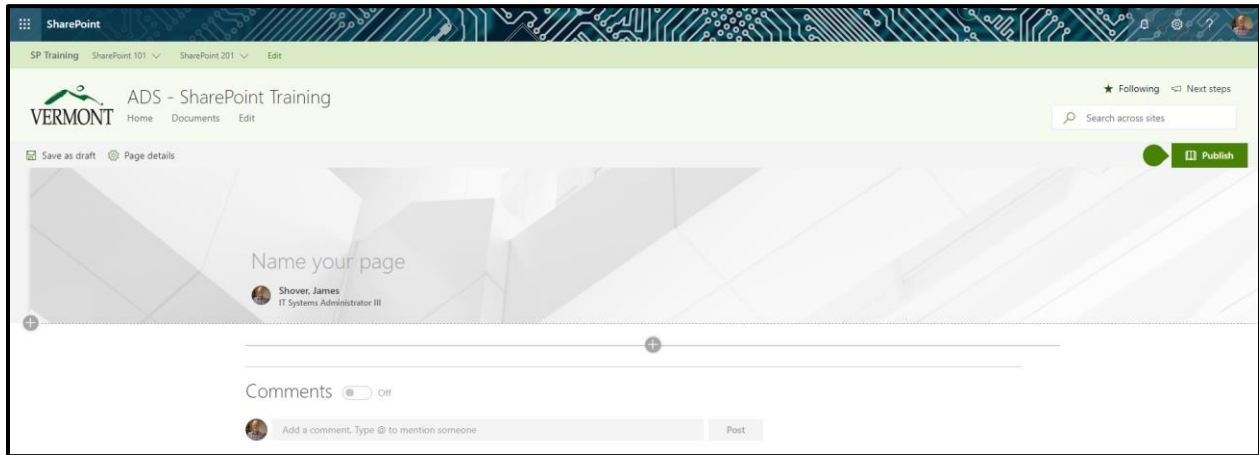
2. Select “Share site” on the drop-down menu to see the following dialog box below (page 6). It will show who is sharing the site (has access), will give the option to invite people to the site, allows the user to email other site members, and (under the advanced selection) provides the ability to manage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

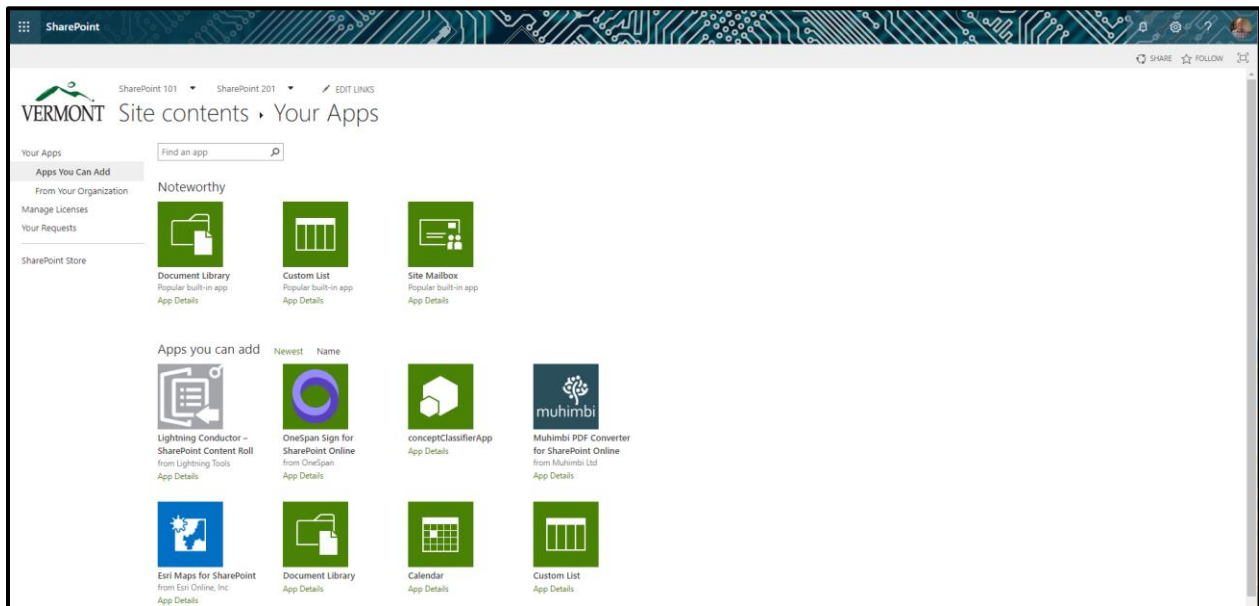


4. Selecting “Add a page” from the drop-down menu will result in new page being added as seen below. This allows the user to generate additional pages on the SharePoint site/sub-site.



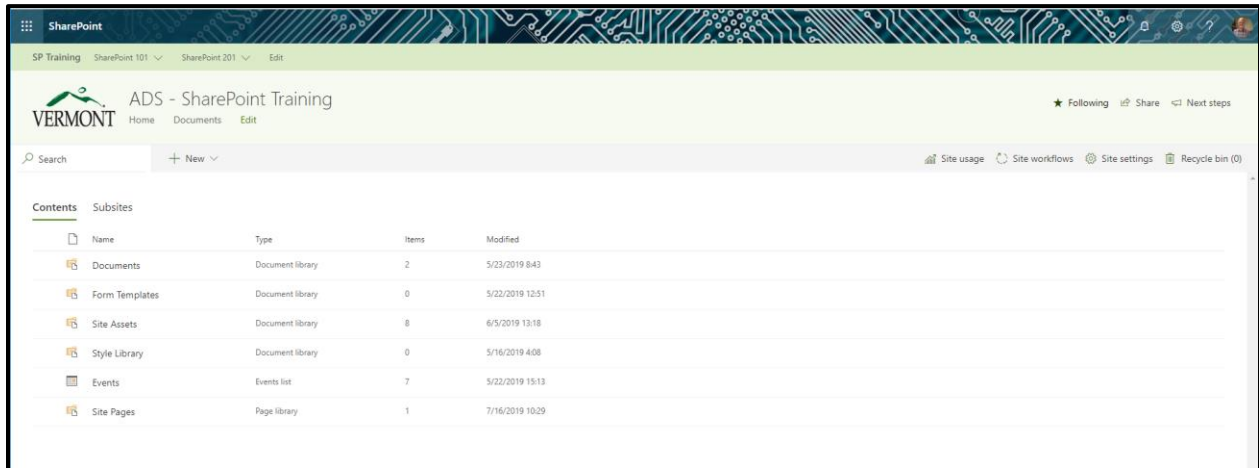
Adding pages is outside the scope of this lesson and will not be discussed at this time.

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



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

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



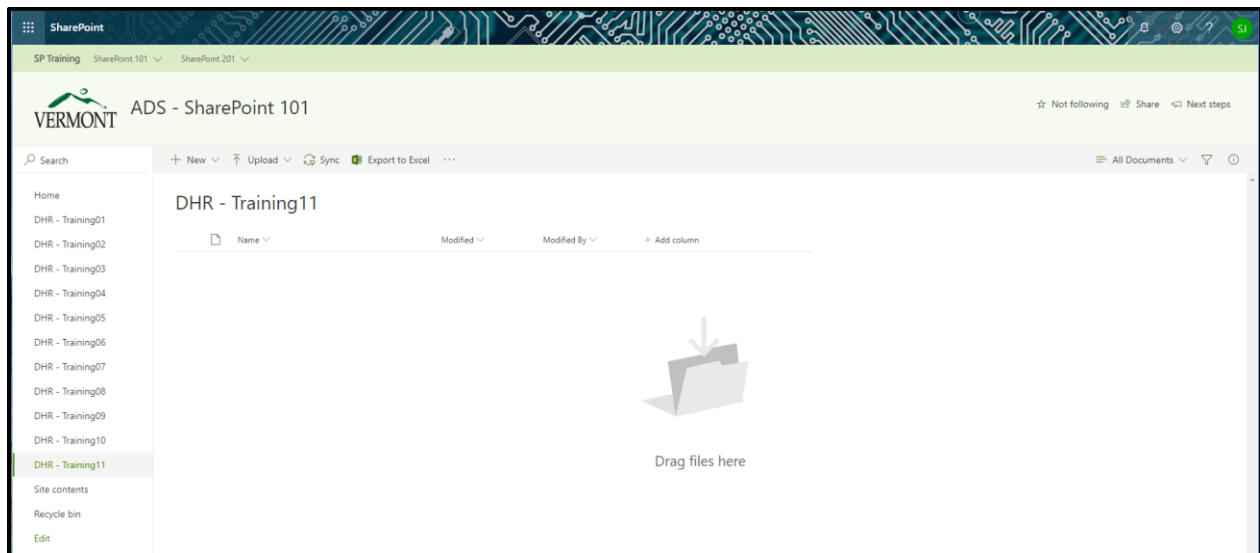
The last remaining selections from the drop-down menu, “Hub site settings”, “Site information” “Site Usage” and “Change the look” will not be reviewed at this time.

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;



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.

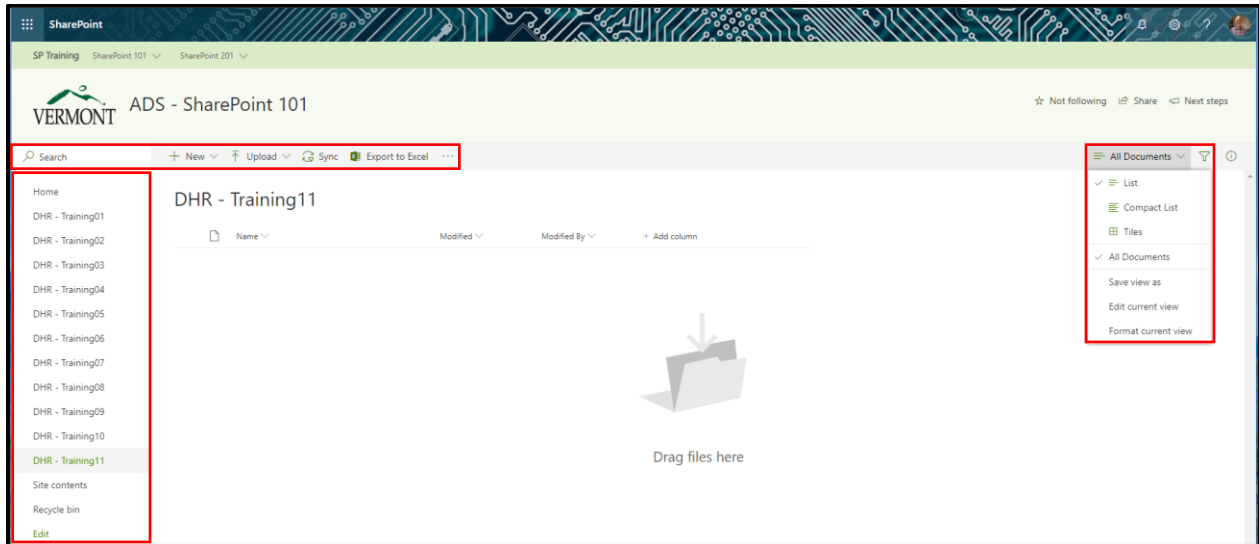
Permissions are one of the responsibilities of the Site Collection Administrator or Owner and are not something that ADS - Shared Services is normally responsible for. A user can have Full Control, Contribute, or Visitor permission levels. In this class you have been given Contribute permissions to the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

Most people using SharePoint have Contribute permissions.

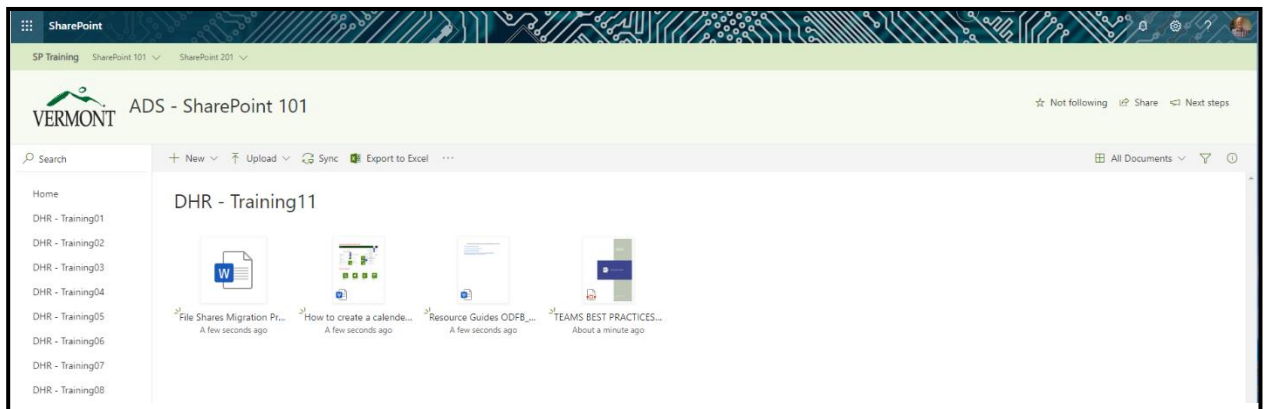
Navigating the Document Library

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).

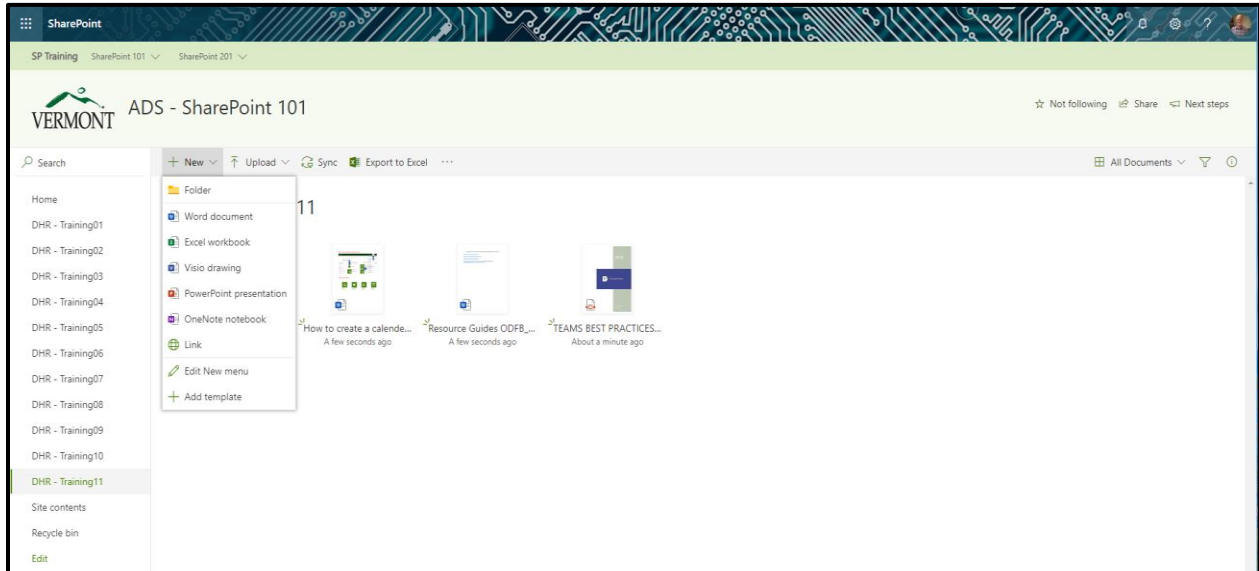


3. The top right is the drop-down navigation which many pertains to views, a filter button and an information button. Selecting "Tiles" will change the document library view, see below.

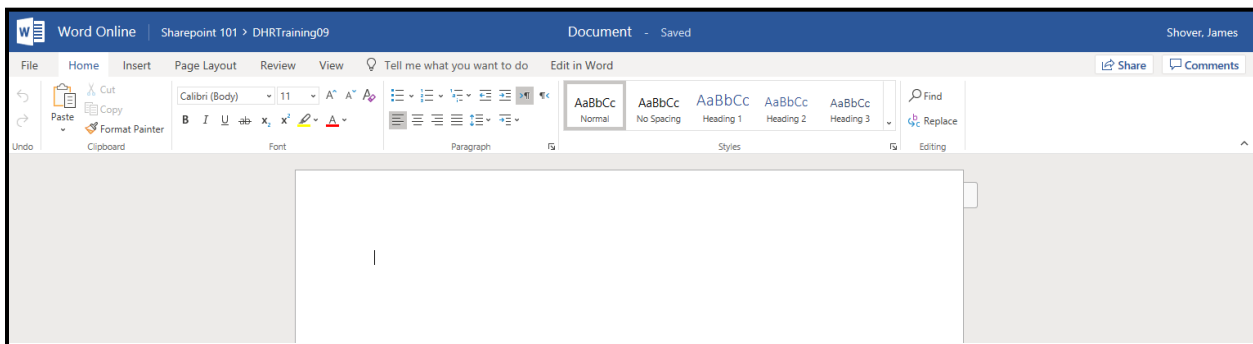


Creating a document from the Document Library

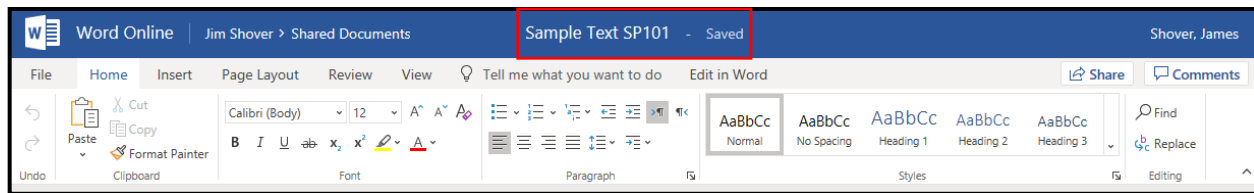
- 1) From the Ribbon Bar select +New
- 2) From the resulting drop-down menu select Word document



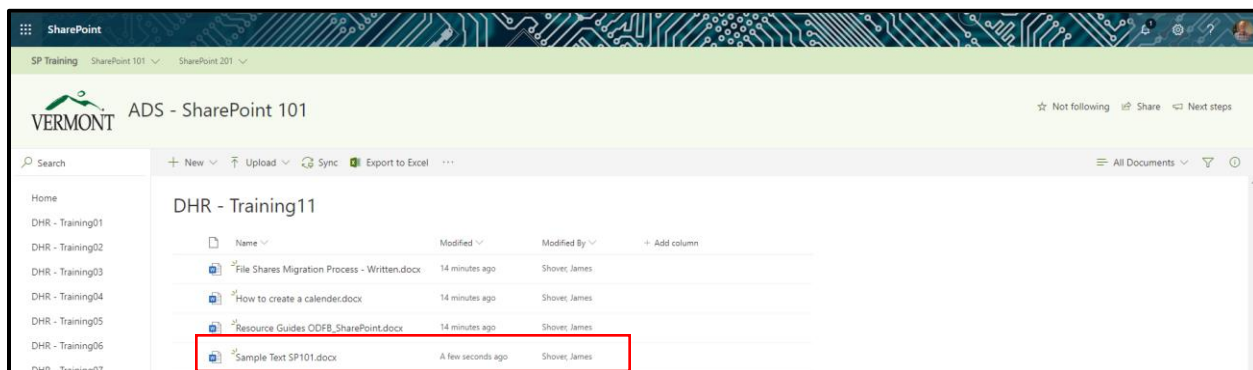
- 3) This will generate the following view:



- 4) This is a Word Online document. 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



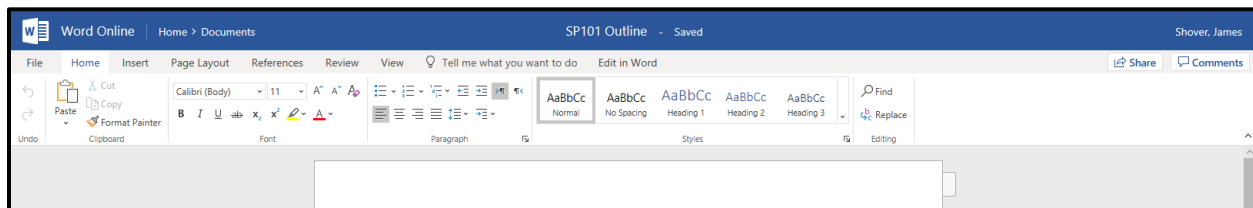
- 5) As edits are made to the file the word Saved will change from Saved to Saving. While editing in the browser every change is saved automatically as they are made.
- 6) Selecting the name of the document library on the top ribbon bar of Word will take the user back to the document library.



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

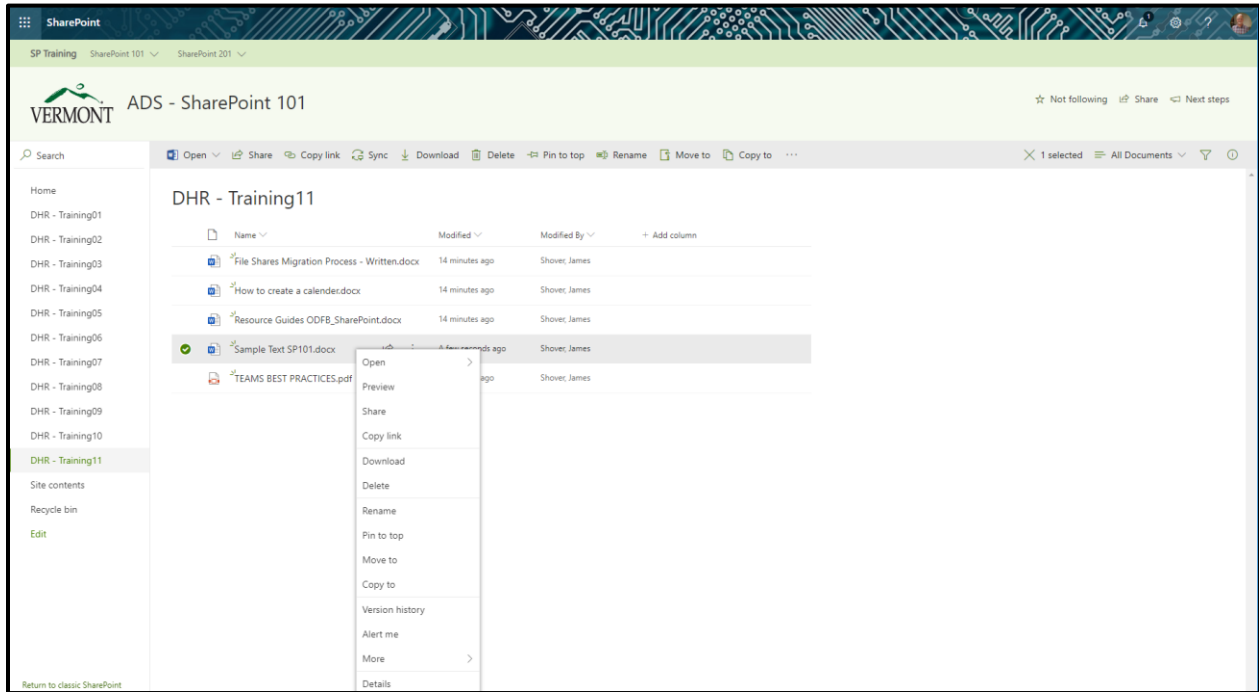
Edit a Document in a Document Library

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.



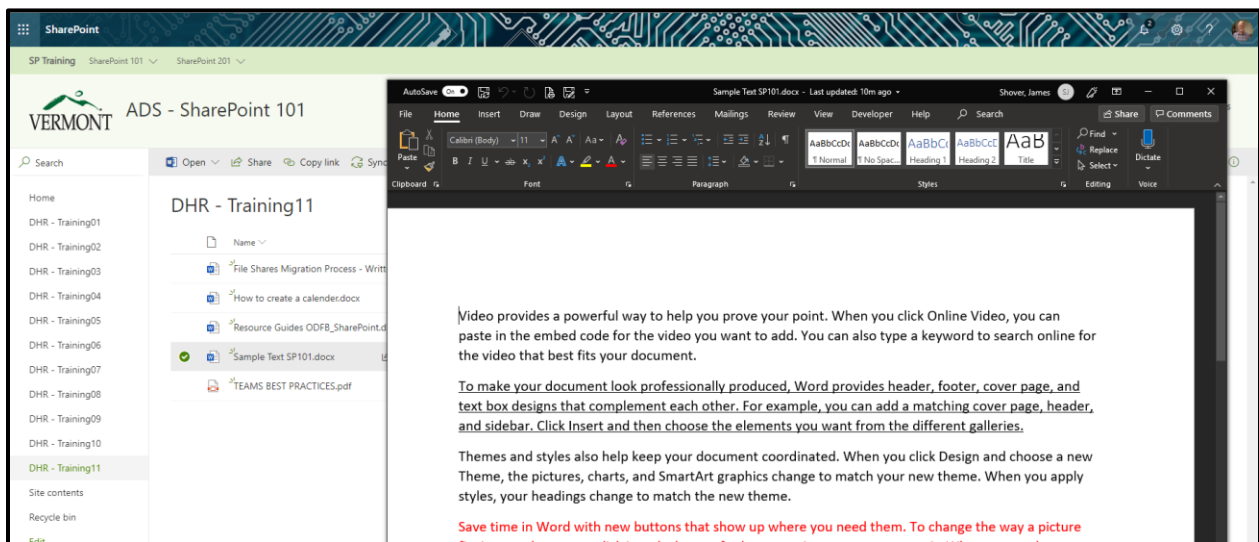
Edit a Document in Word desktop client

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.

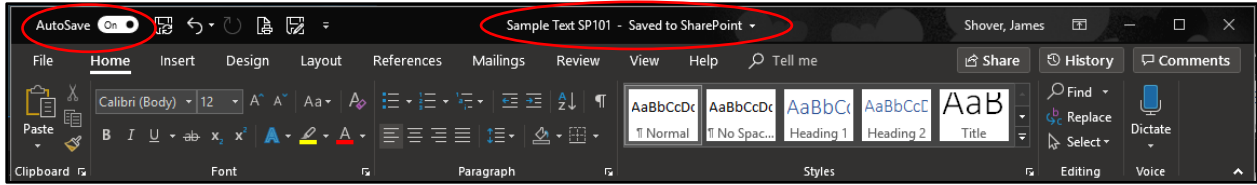


Right click on the highlighted document.

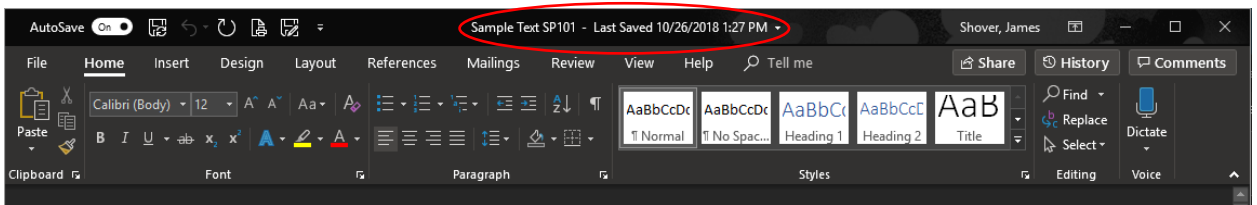
Observe the vertical drop-down menu and the options. Select Open > Open in Word. The word client should open your document and it should look similar to view below.



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.



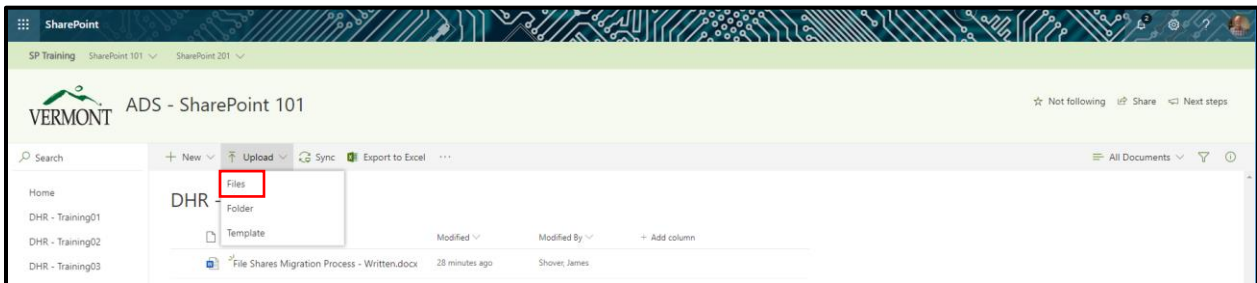
4. When the document is closed and reopened in the client the center bar will have the document title, “Last Saved date and time”



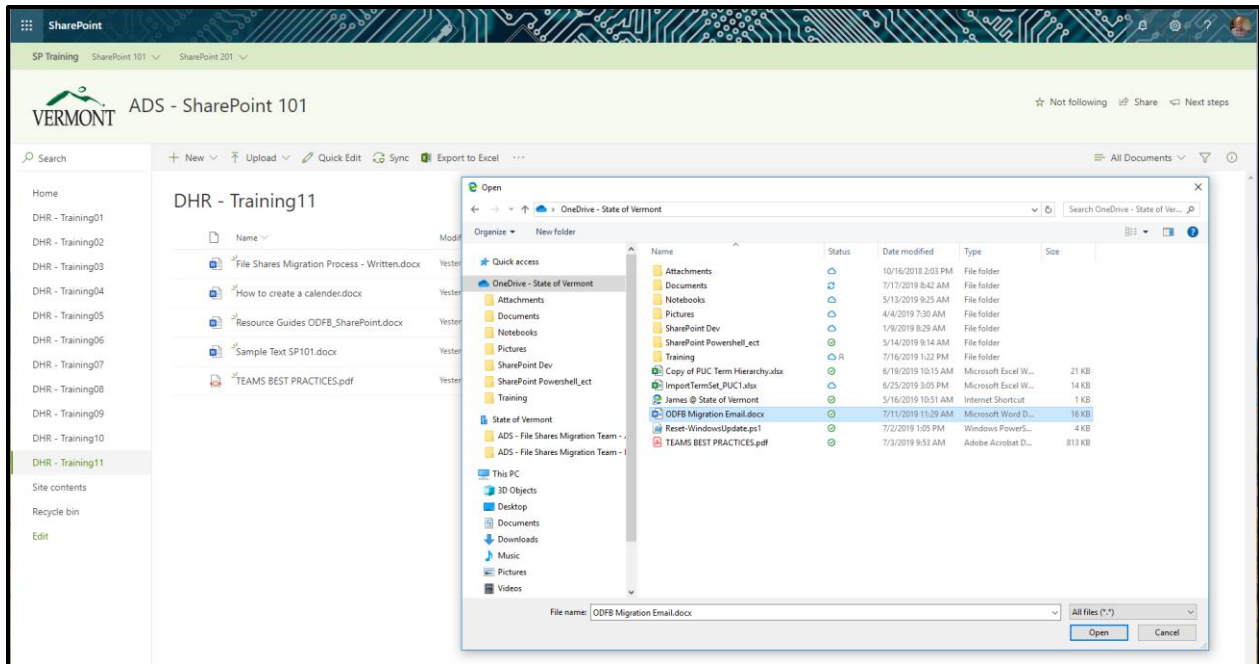
5. Selecting the “carrot” next to the last saved date and time will activate a drop-down menu with the name, location, version history and the ability to send a link.
6. Select “Save As” and save the document to the desktop, close word and return to the document library.

Upload a Document to SharePoint Online.

1. Select “Upload” from the ribbon



2. Select Files to bring up an explorer window

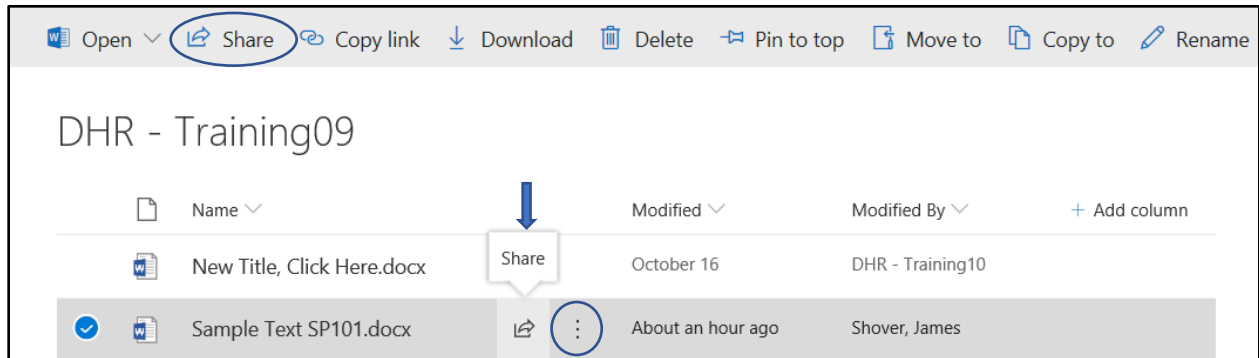


3. Select a document saved to the desktop, OneDrive or whatever source you need. The “File name” will populate. Select “open” and the document will be uploaded to the document library and will now display.
4. The Procedure for uploading multiple documents is identical to uploading a single document.

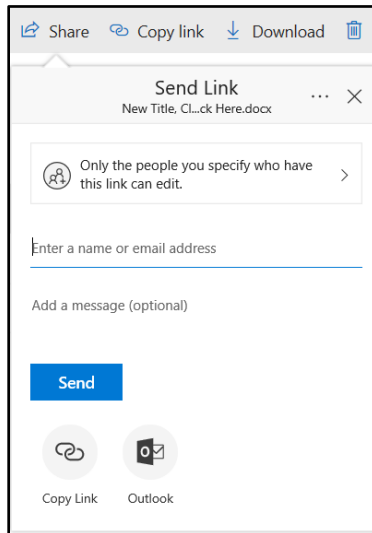
Sharing and Co-Authoring a Document in the Document Library

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.

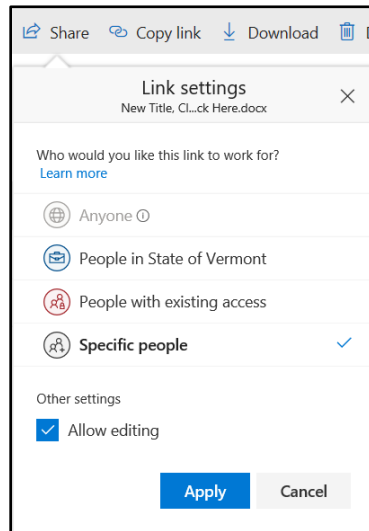


3. This will bring up a dialog box where you can enter the name of the person you would like to share the file with. The file can also be shared with multiple people in the same way.

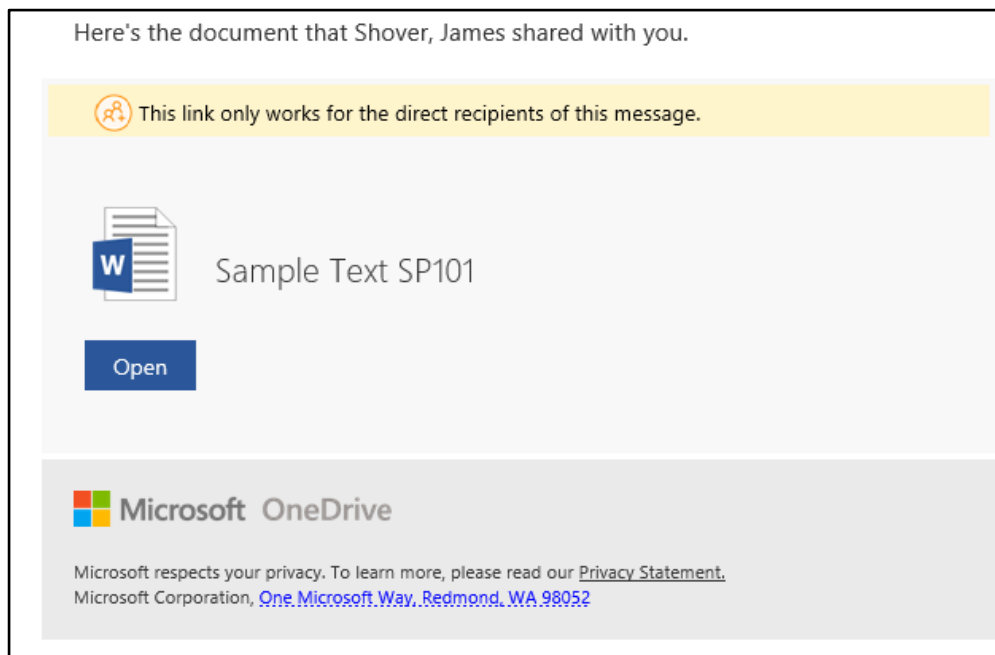


4. Enter the name(s) or email address(es). The text area will automatically populate with names in your organization. A message of up to 500 characters can also be added. Select “Send”

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:

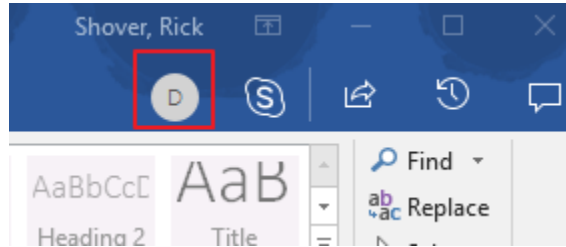


7. Select Open to open the document.
8. The document will open in non-edit mode.
9. Select **Edit Document** in the upper right-hand corner and select **Edit in Word**.
10. When the document is open by two (or more) people the cursor will appear different. The cursor is shaped differently and is red.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

Add·more·text.·¶



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:

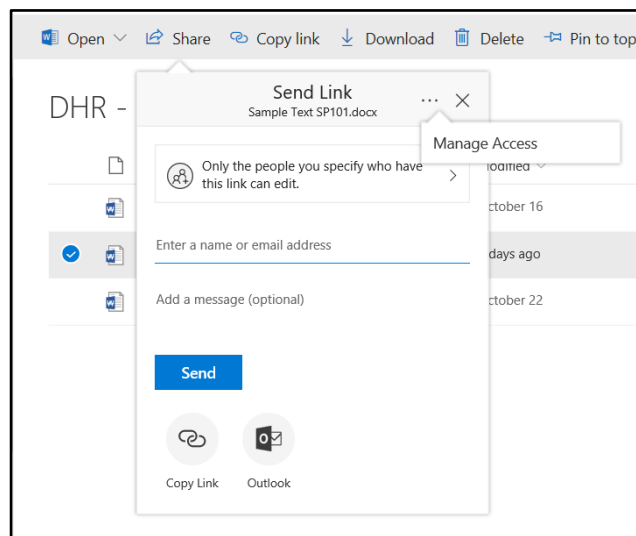
Add·more·text.·¶

Adding·text·to·show¶

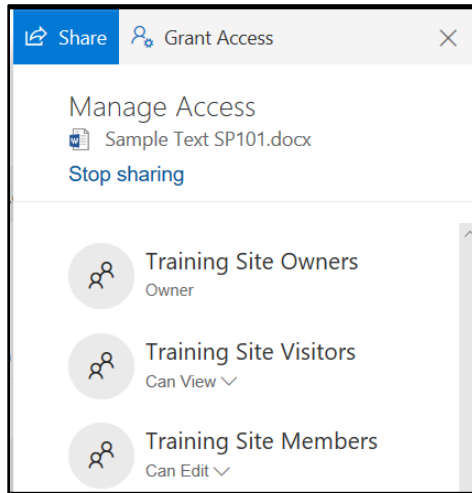


To Stop Sharing.

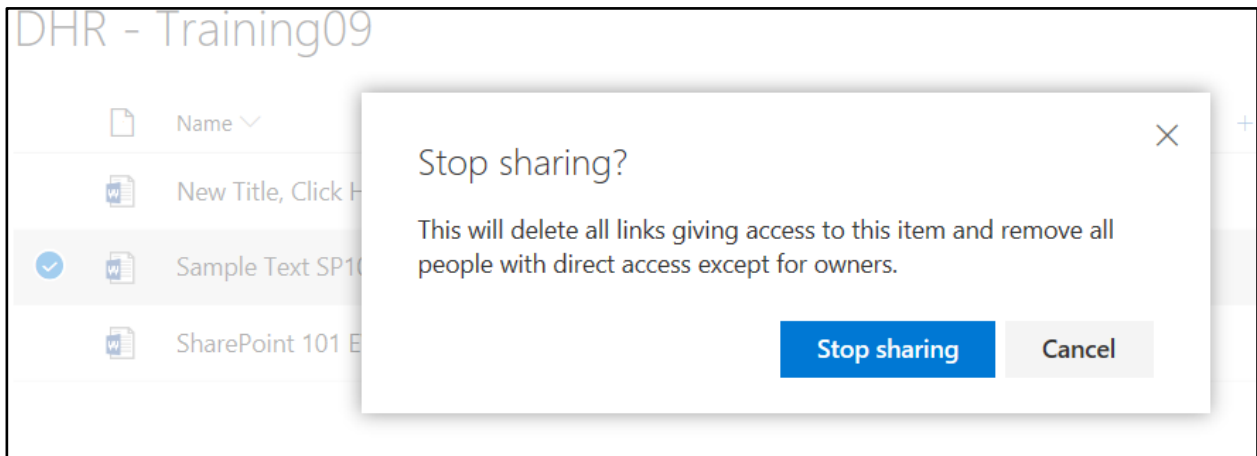
1. From the Document Library, select the file that you want to stop sharing.
2. Select Share from the menu.
3. This will bring up the sharing dialog box; from the ellipses select “Manage Access”.



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 make sure you want to stop) **Stop Sharing**, select **“Stop sharing”** again.



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

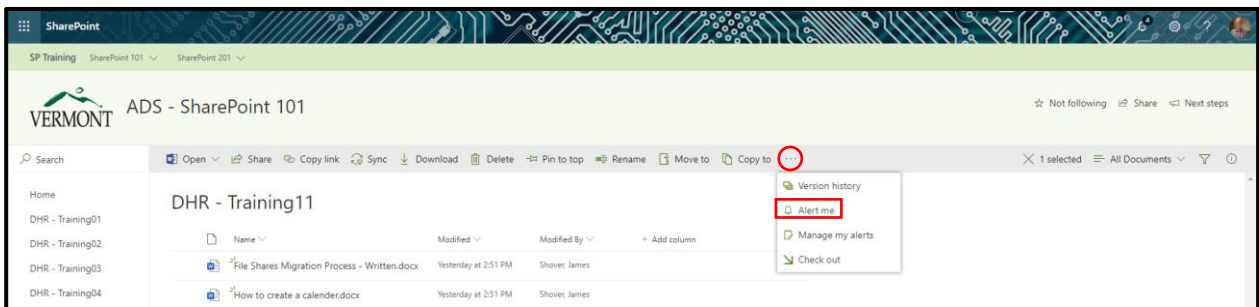
Setting an Alert in SharePoint

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.

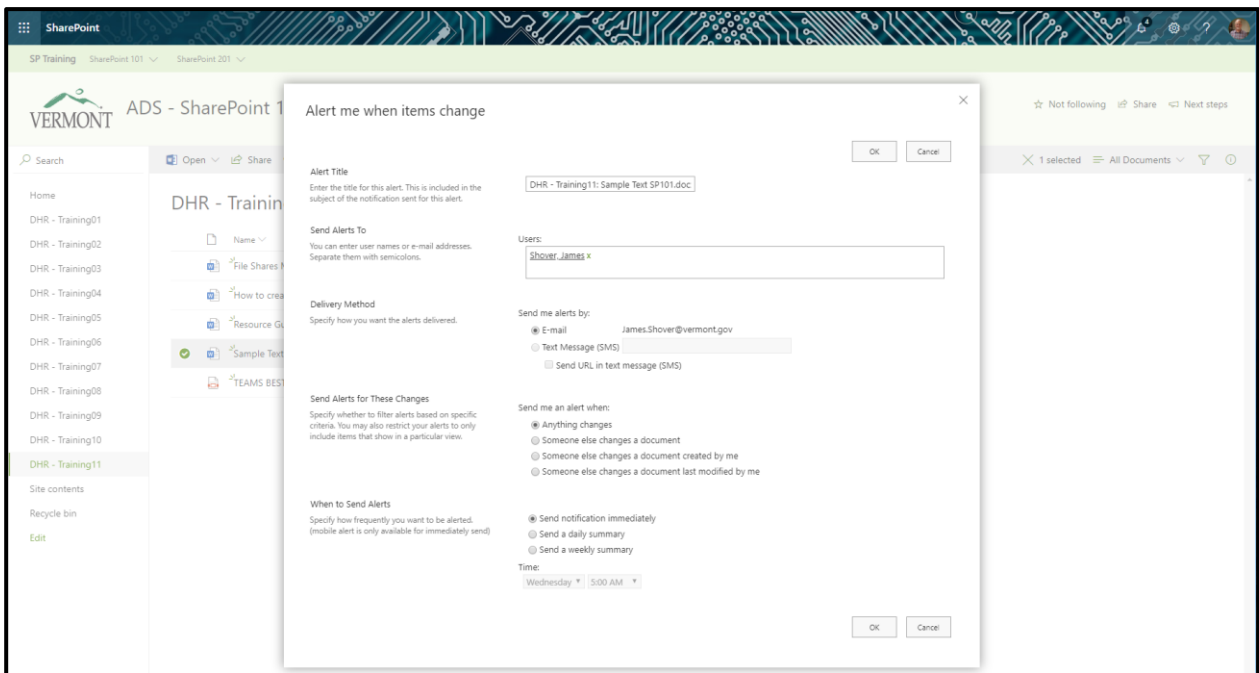
Log into Outlook (web/client) to observe Alert notifications when they are set.

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:



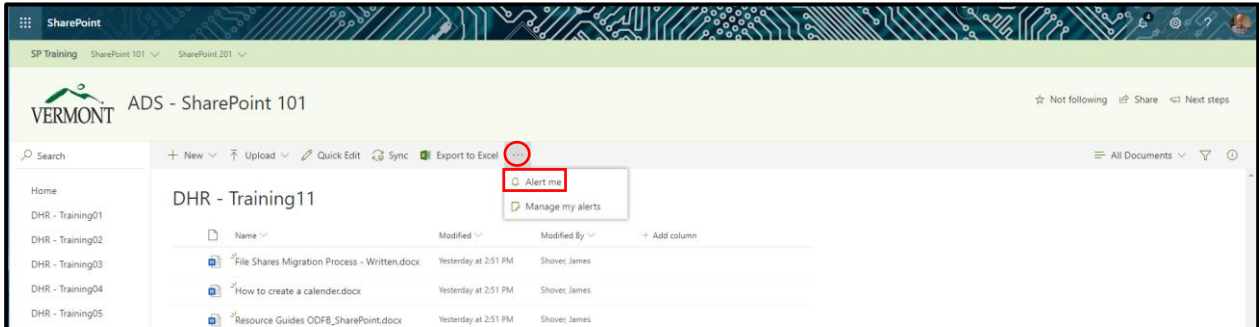
3. Enter alert parameters into the boxes as required:
 - a. Enter a name for the alert
 - b. Designate users to receive the alert
 - c. Delivery method will always be E-mail
 - d. Specify the type of changes to send the alert for
 - e. Specify when to send the alerts

f. Select ok

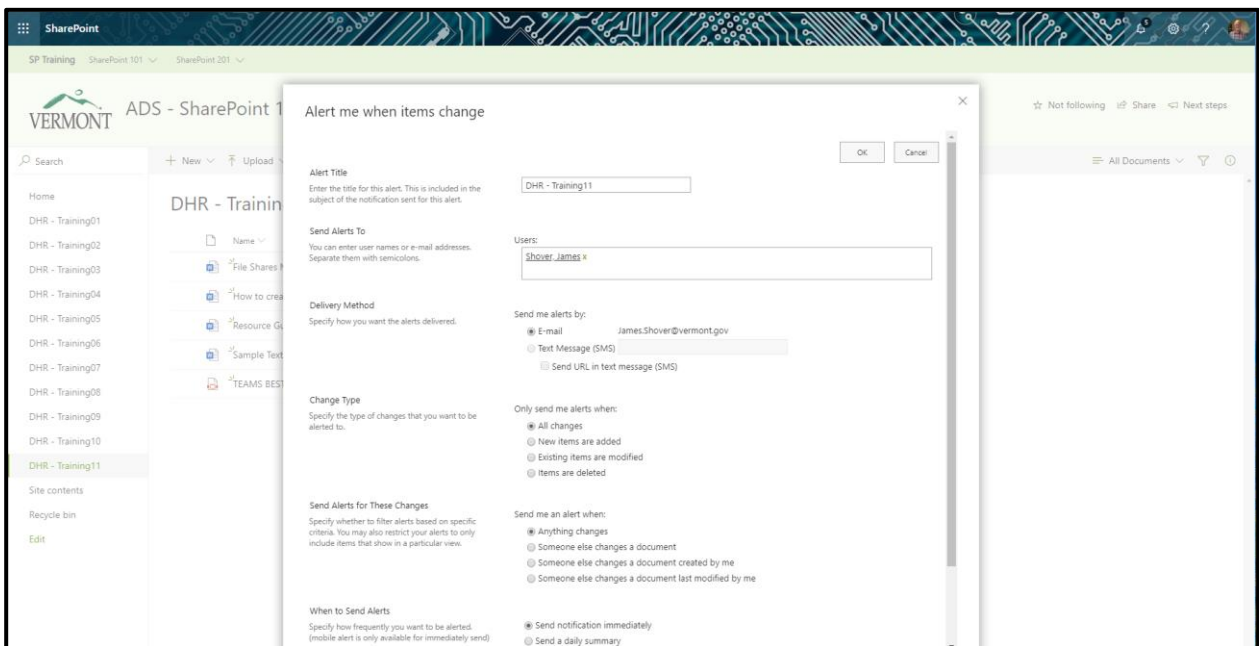
4. Check your email; there should be an email notifying an alert has been setup for that document.
5. Edit the document and verify receipt of an alert email when changes are made.

Setting an alert on all items in a library

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



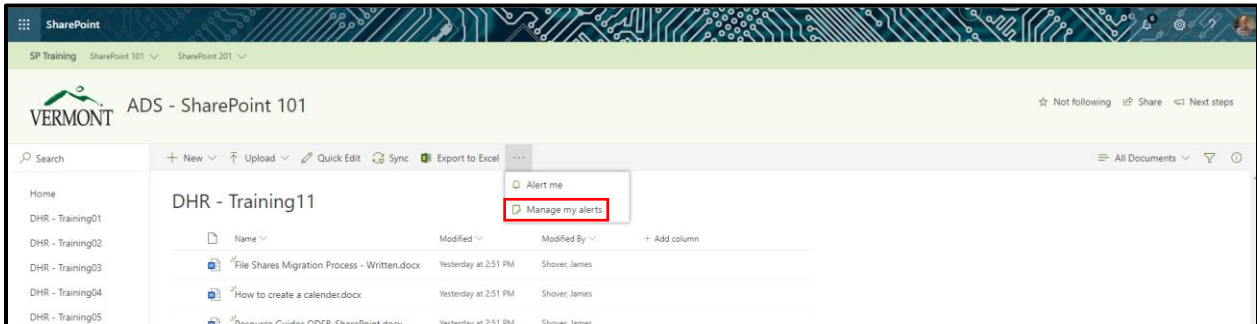
2. The “Alert me” selection will open up the following settings dialog:



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.

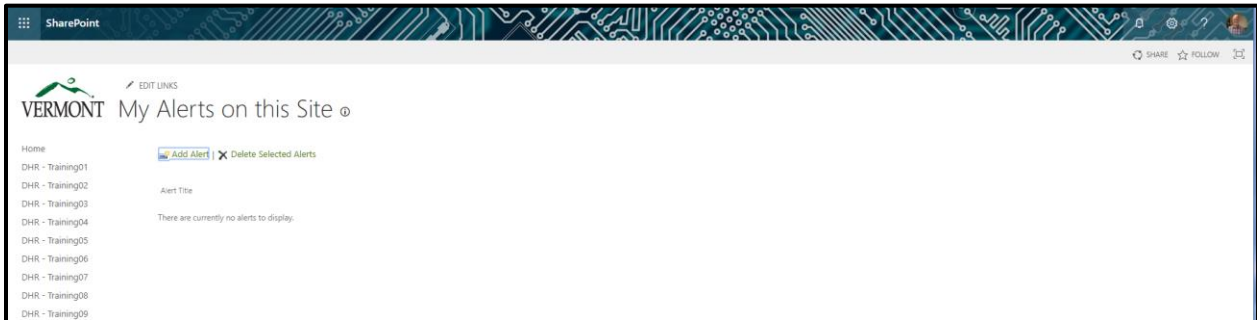
Managing alerts

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



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.



Working with Document Versions

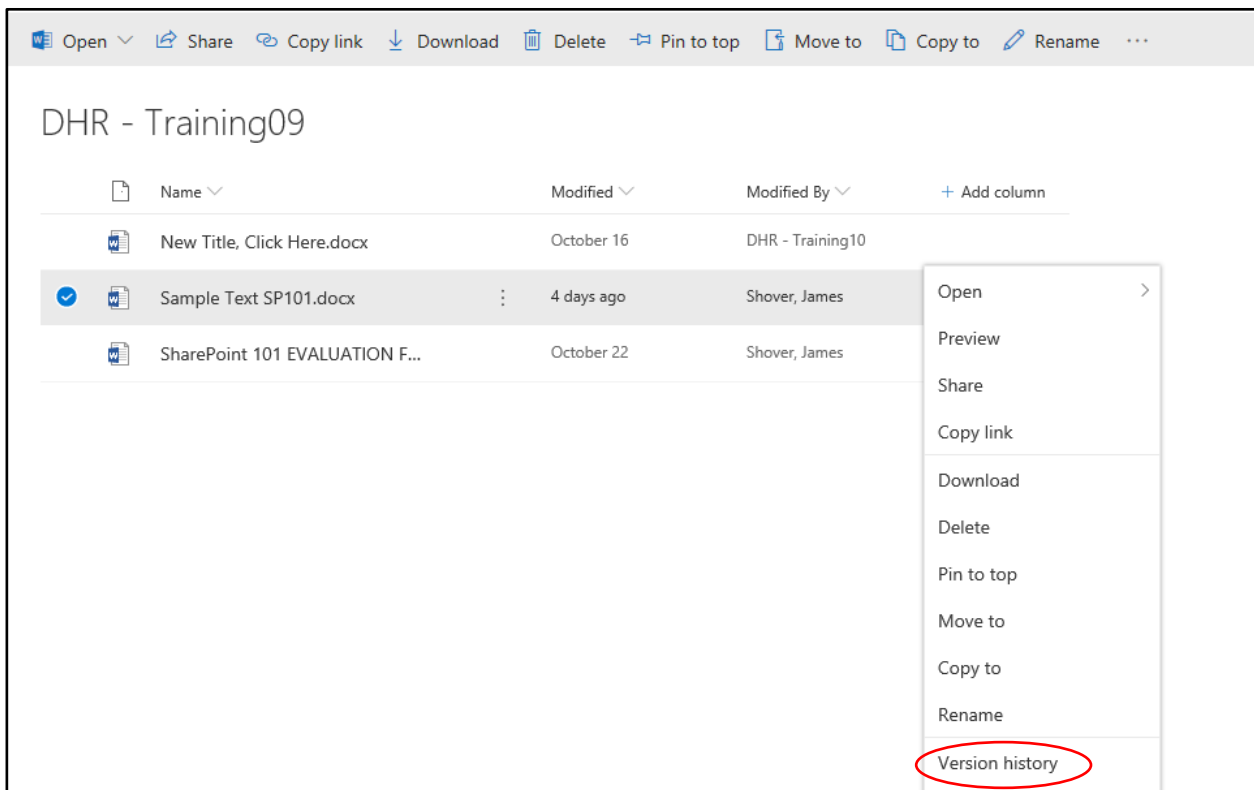
Version history is activated by default when a site or Library is created. SharePoint default settings will keep up to 500 Major Versions; if the Site Collection Administrator or Owner also activates Minor versions, then SharePoint will keep 511 minor versions unless otherwise specified.

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.

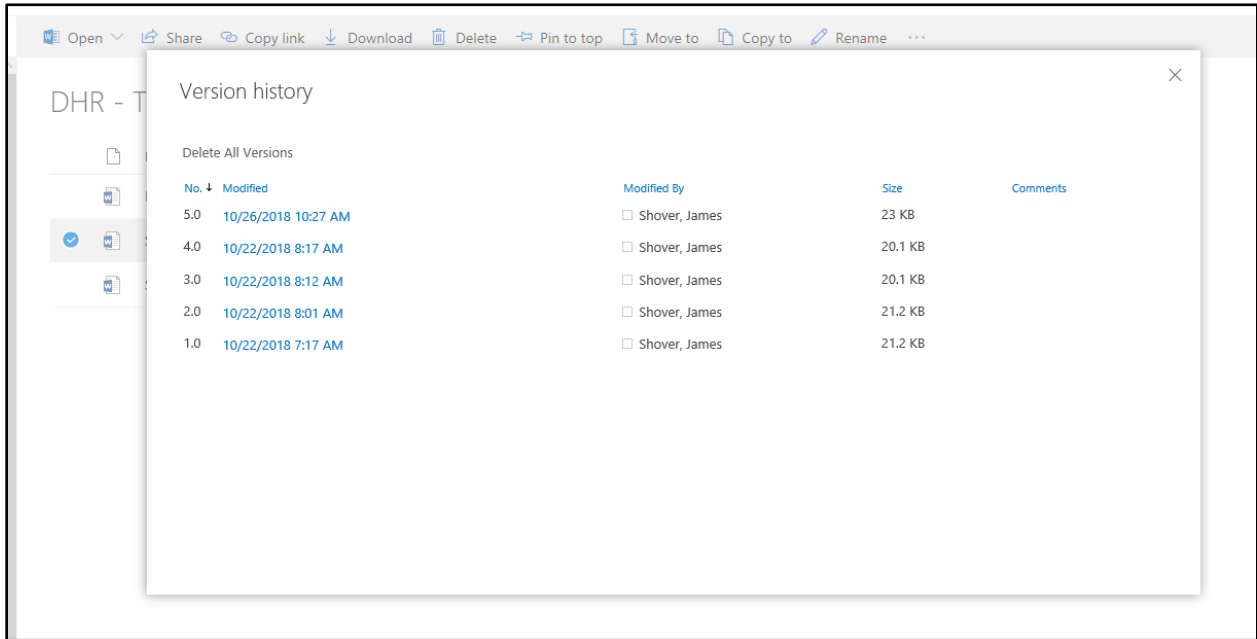
The Site Collection Administrator/Owner should configure the number of Versions that are kept to a manageable amount, this will also lower storage space requirements.

To Access Version History

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

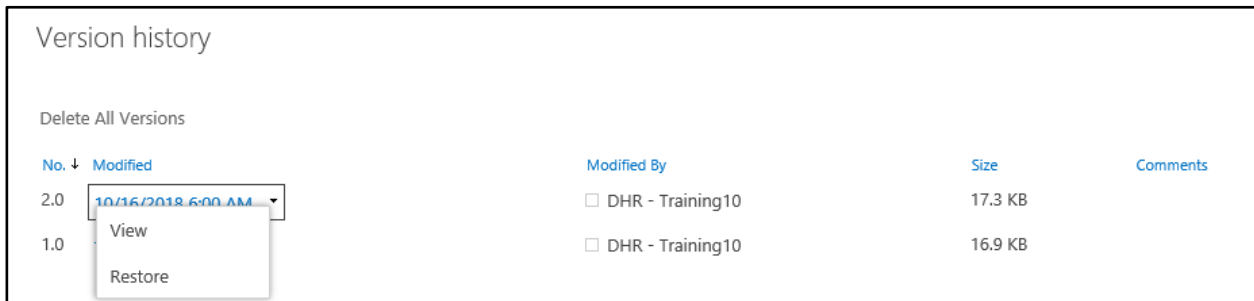


- When Versioning is turned on for the document library the Version History button is available; when the user selects it, they will see a screen like the one below.

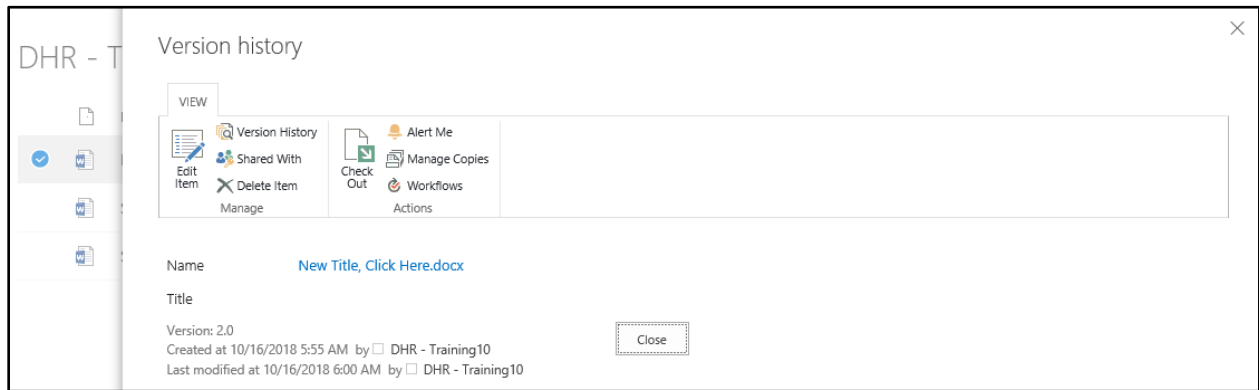


CAUTION: The user has the ability to delete all versions.

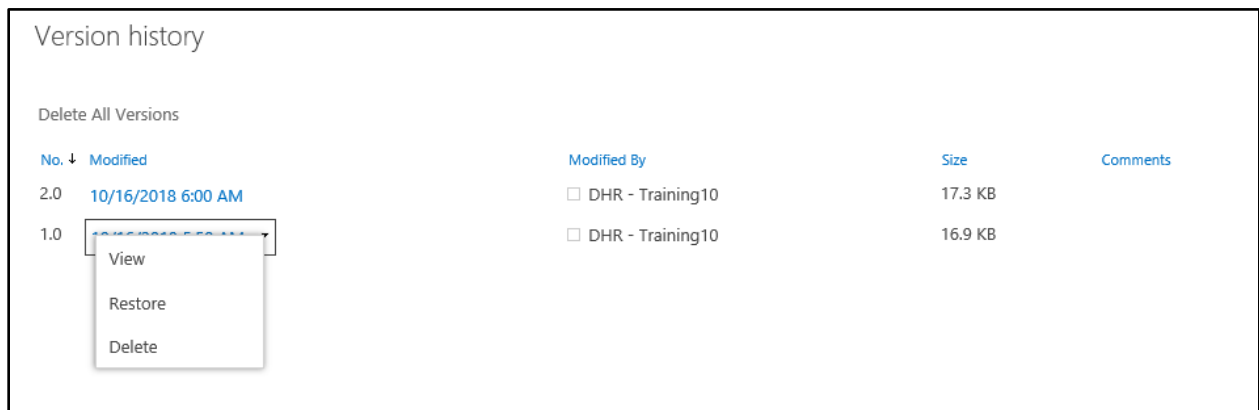
- The user will be presented with a list of the current versions, the date and time they were created, who they were created by, the file size and any comments that were entered by the author(s).
- Hovering the cursor over the most current modified version will highlight a box around the text; selecting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



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.

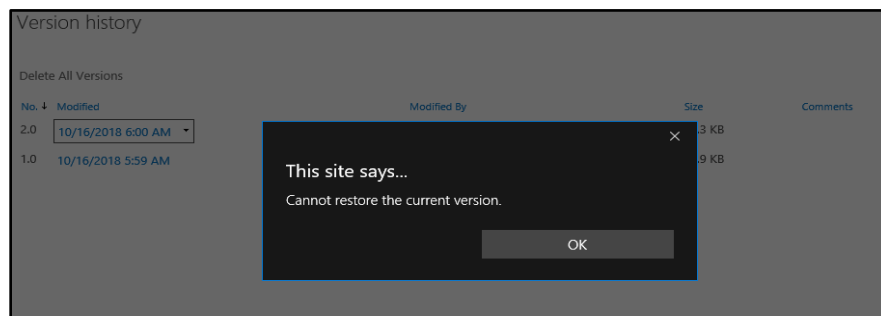


6. Hovering the cursor over an older version will highlight a box around the text; selecting the “carrot” will display three options, View, Restore and Delete.



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:

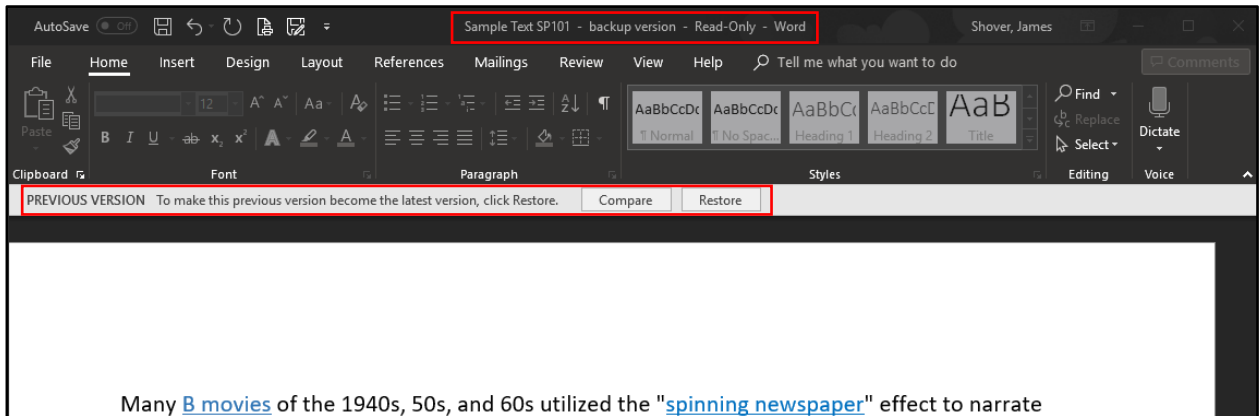


7. A user cannot delete the latest version; however, the user can delete older versions.

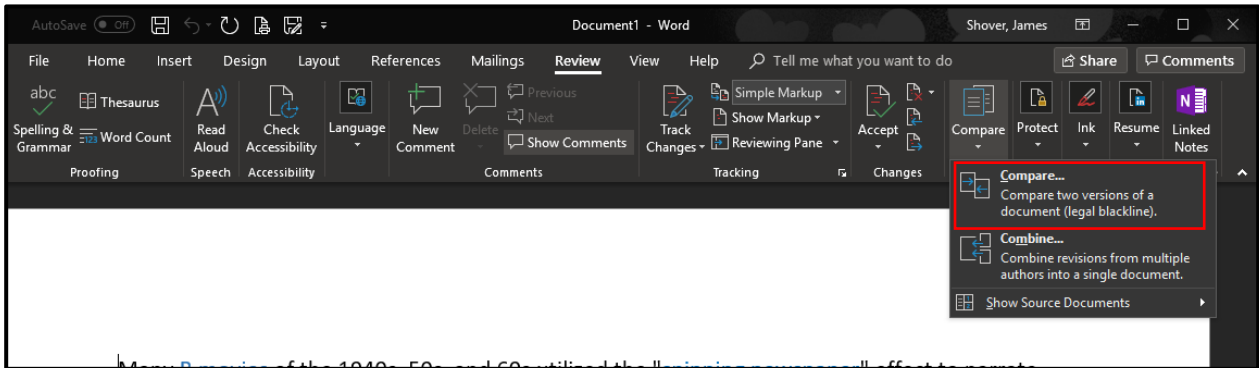
To Compare Document Versions

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.

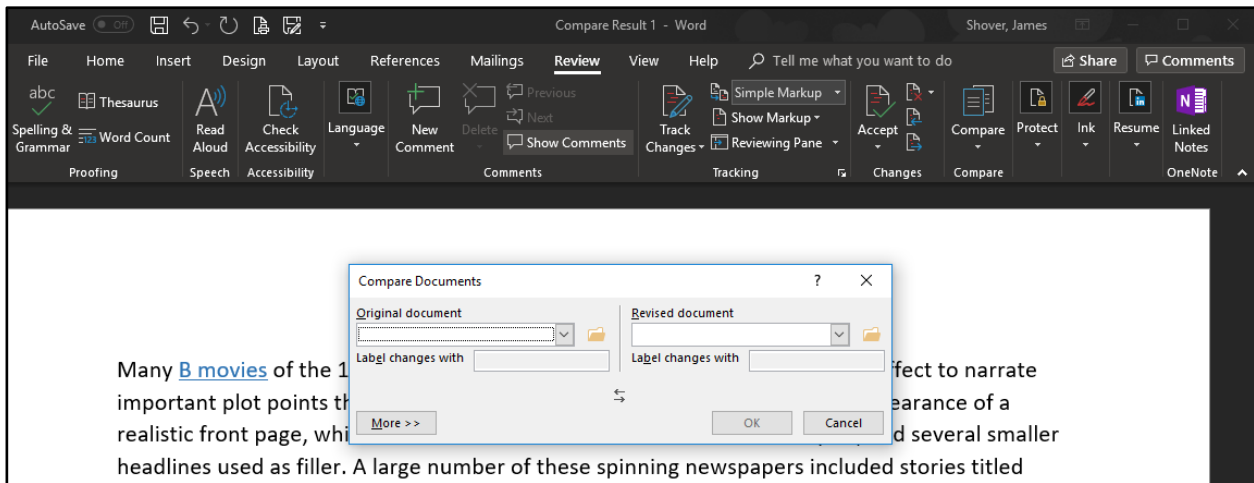


2. Notice when Word opens that the menu bar title reads "... - backup version – Read Only – Word"
3. The ribbon bar directly above the text area provides the user with two options, Compare and Restore, select Compare, you will be presented with the following view.

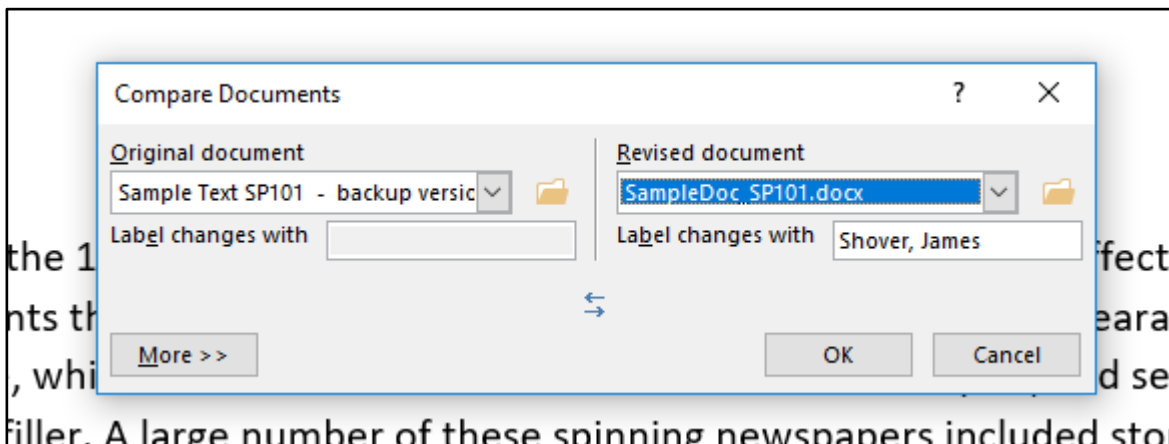


4. Select "Compare..." on the menu bar in the Compare dropdown window.

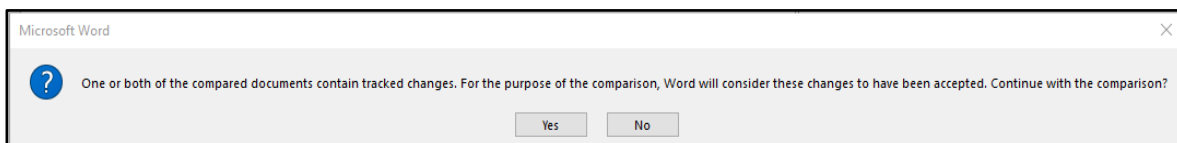
5. The user will then be presented with the following screen:



6. The Original Document is going to be the one that is currently open. Select the drop-down 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:

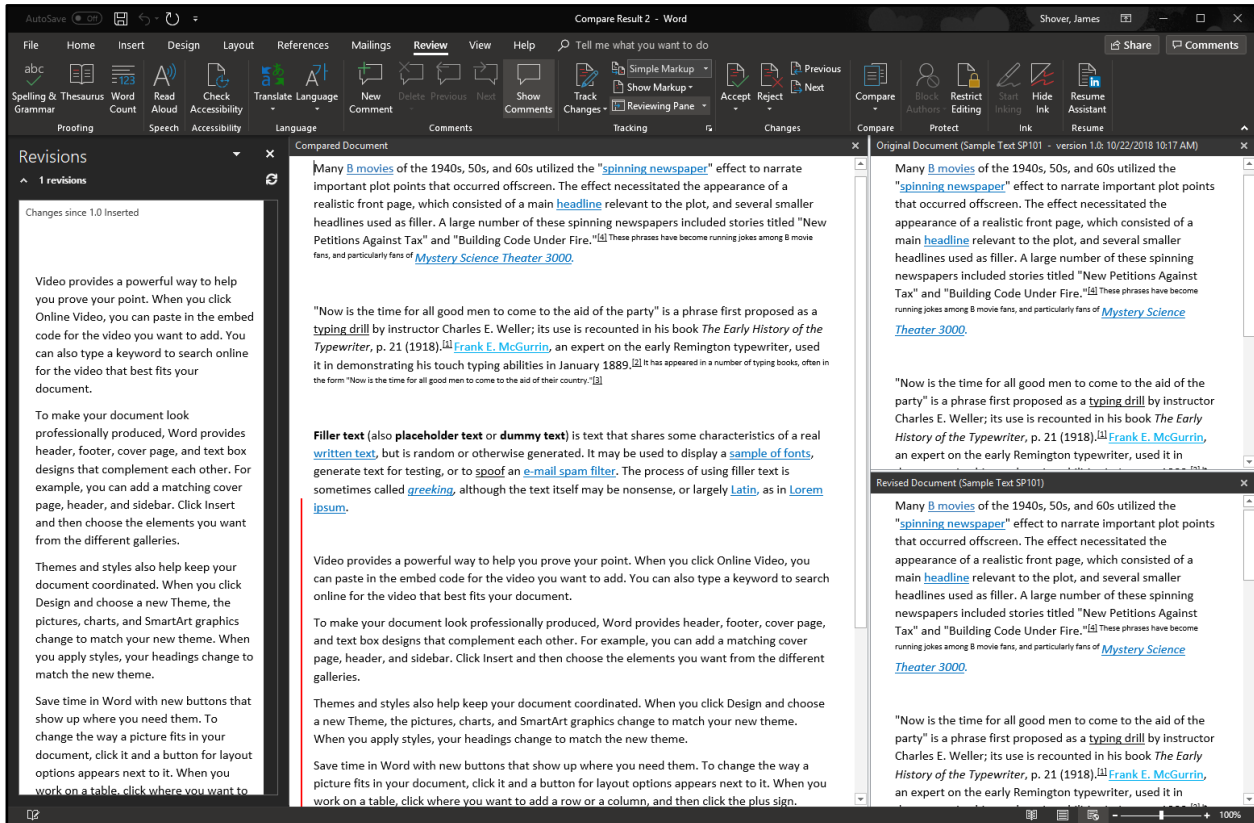


8. Select OK, you will see the following dialog box.



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.

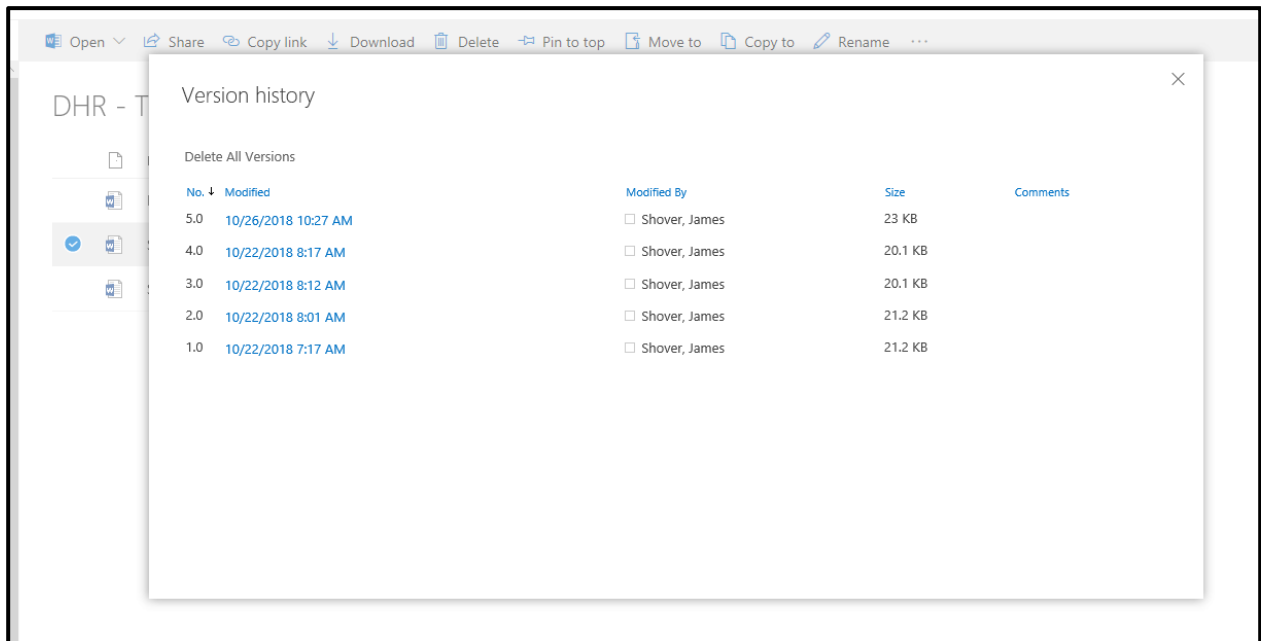


11. The screen that comes up within the Word document includes the original and revised document in the windows on the right, the changes are highlighted in the document in the center and the revision since version 1.0 is in the left window.
12. To exit this view, simply select the “X” on the various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

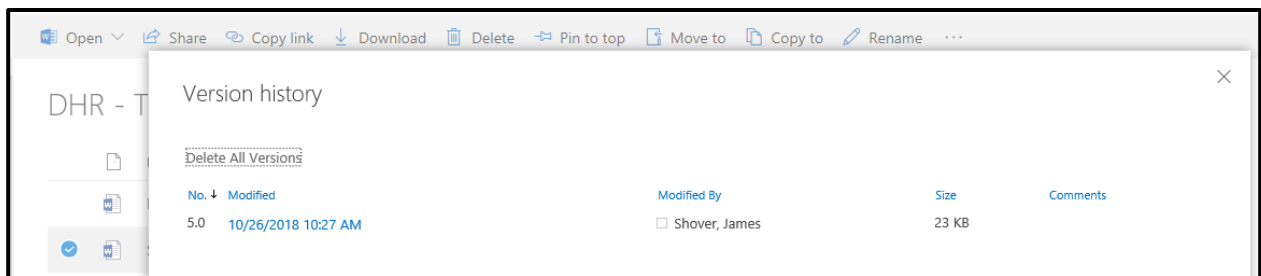
Deleting Versions

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:



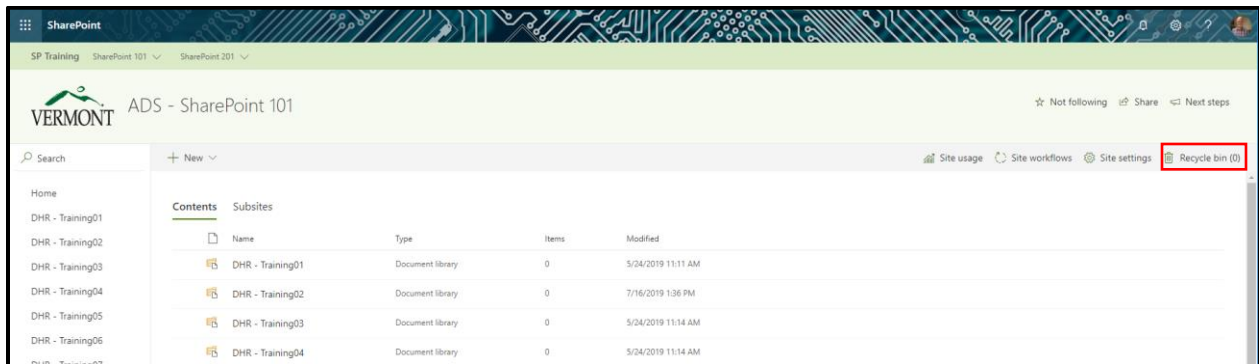
After selecting Delete All Versions:



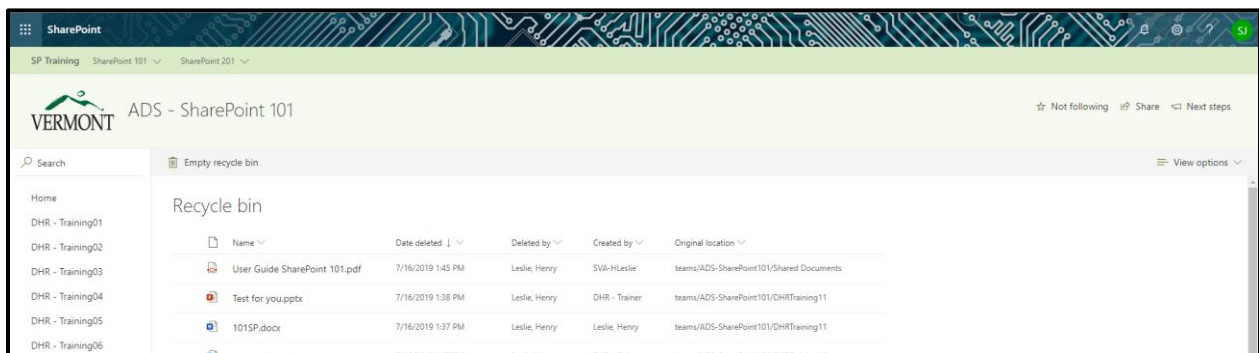
Notice the only version left is the most recent, the other four have gone to the recycle bin. If the user wants to retrieve these older versions, they may do so using the following procedure.

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

3. The following screen will be presented.

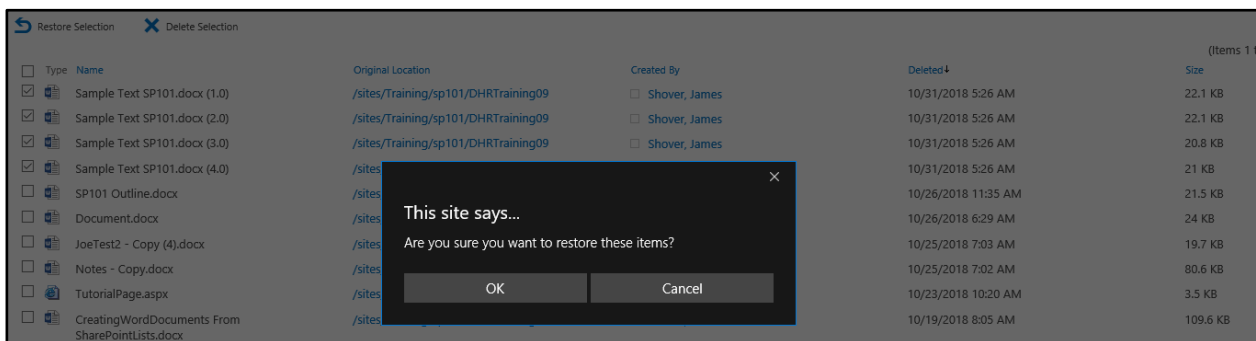


4. Select “RECYCLE BIN” to view deleted files.



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:



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

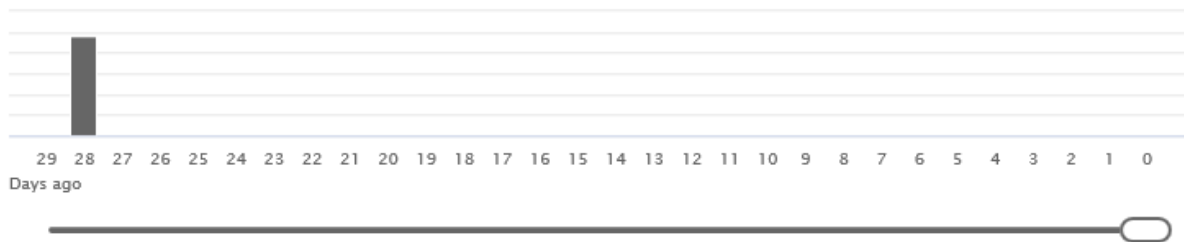
1. Go to the SharePoint document library you'd like to restore
2. Select **Settings**  > **Restore this library**
3. On the Restore page, select a date from the dropdown list, such as **Yesterday**, or select **Custom date and time**.

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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

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



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

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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 and time

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



Select a change in the list below to highlight it and all the changes before it. Then select the Restore button to undo all the highlighted changes.

Change	File name
28 days ago - 10/15/2019 (20)	
<input type="checkbox"/> Restored from the Recycle Bin by unknown user 9:39:1...	<input type="checkbox"/> 2019 fishing - Copy.docx
<input type="checkbox"/> Deleted by DHR - Trainer 9:38:15 AM	<input type="checkbox"/> 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.

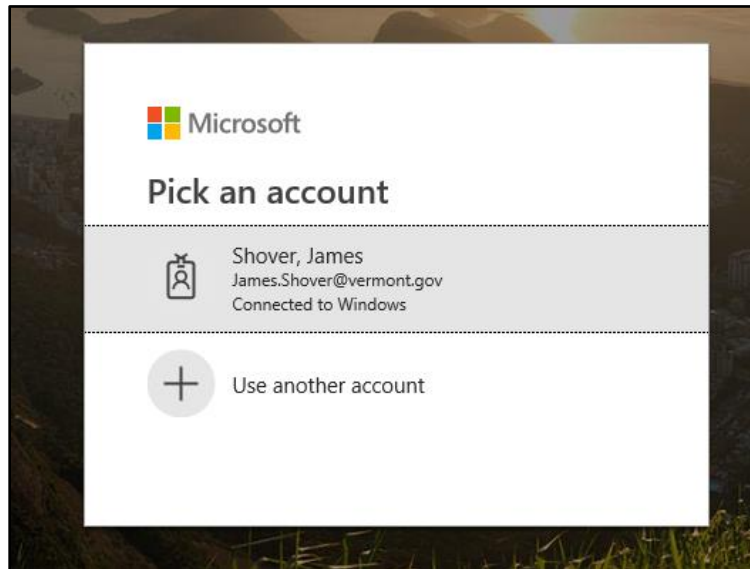
5. If you're selecting a custom date and time, select the earliest activity that you want to undo. When you select an activity, all other activities that occurred after that are selected automatically.
6. When you're ready to restore your library, select **Restore** to undo all the activities you selected.

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

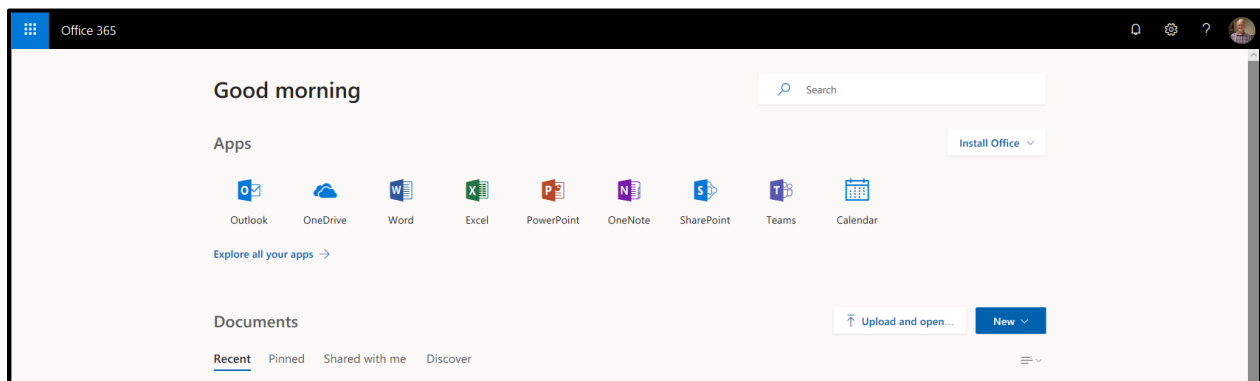
Office 365 Introduction

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

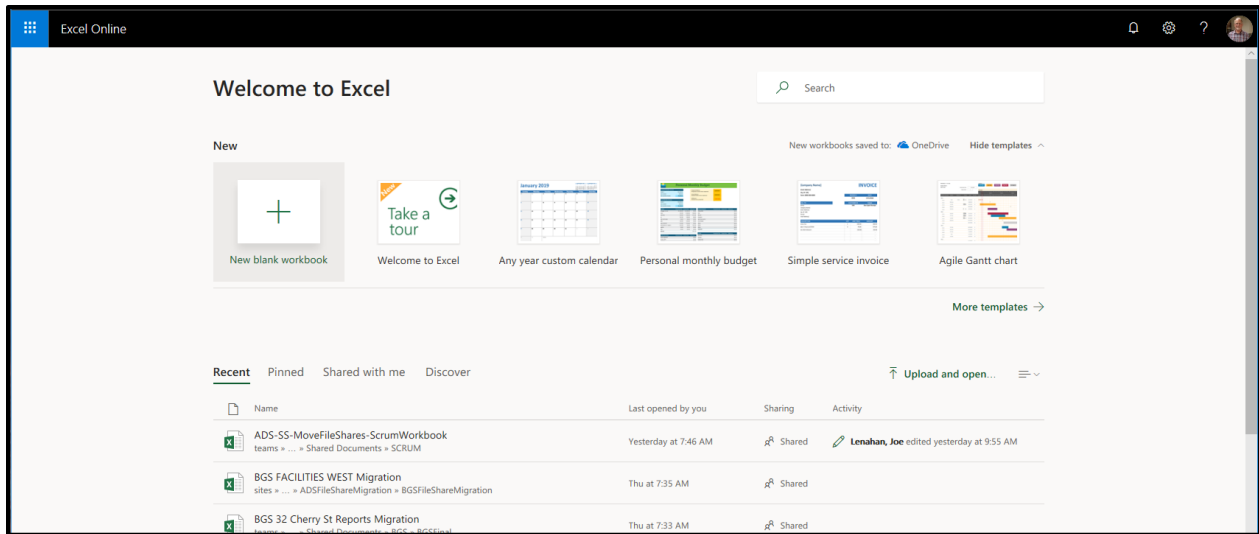
There are two ways to navigate to the portal, open a browser and enter portal.office.com or enter [HTTPS://login.microsoftonline.com/](https://login.microsoftonline.com/) . Either of these will bring the user to the following screen:



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

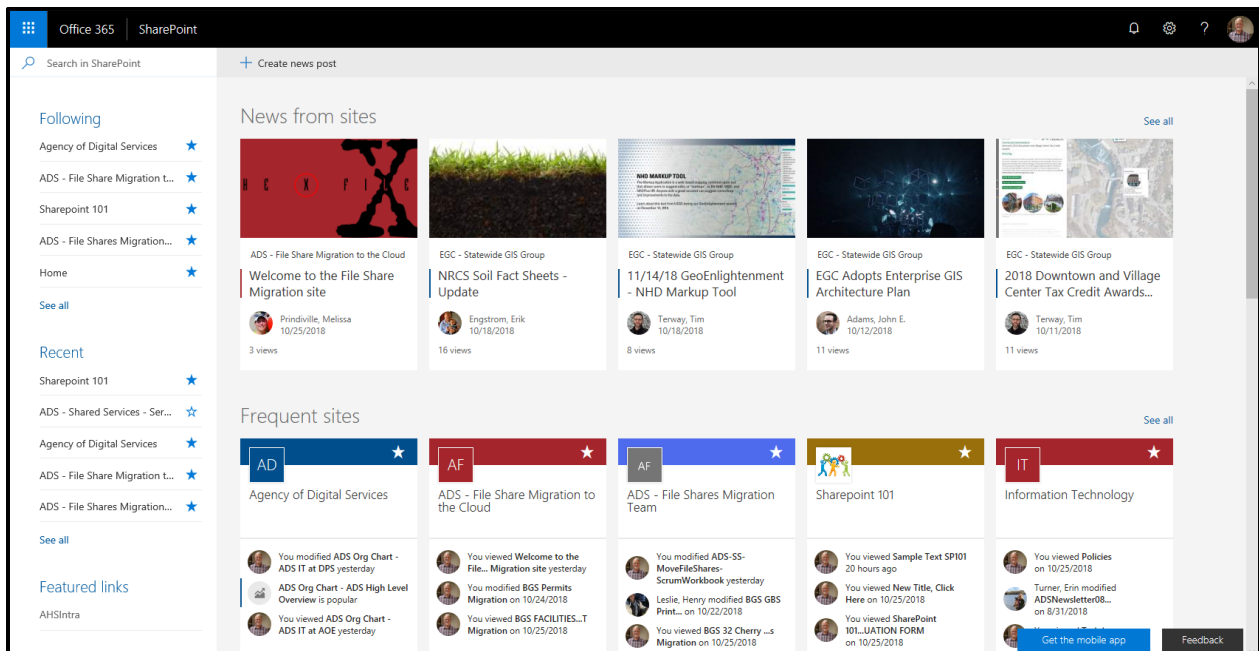


This is the O365 landing page; under “Apps” are a list of the office applications that the user is authorized access to. The user can select any of the apps to use them. As an example, if the user were to select “Excel” the following screen (next page) would display:



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.