Introduction

Hi! My name is Megan and I work for Nicolet Federated Library System. This tutorial is about SharePoint, a resource available through Office 365. I am going to walk you through what SharePoint is, how to create a basic site on SharePoint, and share some possibilities of using SharePoint. Click the next button to continue.

Module A – How This Tutorial Works and Learning Objectives

I'm going to start by showing you how to navigate this tutorial. There is a title on top saying which module it is and the title of the module. There is also a menu here to the right so you can jump to any of the modules. I would suggest going in order the first time but then after that if you need to review anything feel free to jump around. I also wanted to mention that there is this transcript for all these modules down here so if you want everything I'm saying in the videos written down, there is that option right there. There's also a "Back" and a "Next" arrow.

Start by watching the video. It's a YouTube video so just click and it will start playing. You do have the option to make it bigger once it starts playing. Below the video will be a task related to each module. I'm going to ask that you watch the video, and then complete the task. It's practice; I'm going to talk about a concept and then I want you to practice it. After you watch the video, complete the task before moving on to the next video. When you are done with the tutorial, you should have a basic SharePoint page built. You will want to have two tabs open on your web browser to do this.

The learning objectives for this tutorial are:
•To understand what SharePoint is
•To be able to create a SharePoint site
•To be able to upload documents to SharePoint and share the documents with other users
•To feel comfortable enough with SharePoint to explore possibilities and try out new things on SharePoint

I'm just going to go over the basics, but as with any new technology you want to play around with it in order to truly learn about it.

So let's start with the first objective: what is SharePoint? SharePoint is a platform that supports collaboration and content management. My main purpose in using SharePoint is to create shared documents and tasks with my coworkers. Because it uses a server, any changes I make on a SharePoint document are saved immediately, similar to Google Docs. It is meant to be used to "Create [a] community of people who have access to a common set of information that's always kept current." This saves the hassle of downloading and saving new copies in order to update them. Also everyone has access to the items all the time (if you choose to give them full access). You can also a create a website for users. I'm not going to talk about that in this tutorial but just know that it is an option.

Because SharePoint is a Microsoft product, it can connect to other Microsoft software, including Word, PowerPoint, and Excel. They were all made to work with SharePoint so it is easy to download and upload these to your SharePoint site.

I want to take a minute to talk about what will not be included in this video. I will not be going over all the functions of Office 365 or the advance features of Microsoft Office on Office 365. You should have some basic knowledge of how to upload a document and how a Microsoft Word document works.

Our second and third objectives are to create a page on SharePoint and to be able to download and share the documents with other users. In the next video, I'm going to break down this process step by step, starting with how to access SharePoint. Again, by the end you should have a basic SharePoint page.

The last learning objective is to feel comfortable enough with SharePoint to feel confident in trying new things and explore possibilities on SharePoint. The good news is that you can create a test site to play around in before creating a group site. In the next module, I'm going to talk about how to get to SharePoint to get you started. Your first task, if you haven't already, is to open a second tab on your web browser. Click next to continue.

Module B – Getting to SharePoint

There are several ways to get to SharePoint. If someone has already invited you to a group, you can click on the link in your email that was sent to you. It looks like this; you can just click on that. If you are already logged onto your Microsoft Office email, you can click on the group of boxes on the top left here, and then SharePoint, to bring you SharePoint. This is what it should look like.

Finally, if you aren't logged in at all, go to your online email and do what I just did, or Office 365, or even just type in Office 365 log-in in Google. Your log-in will be your work email and email password. Once you log-in, you will be most likely brought to either your email or Office 365 (which is this screen). Then, just click on SharePoint. I would suggest bookmarking Office 365 to make logging in easier in the future.

Your task is to open Office 365 and bookmark it.

Module C – Starting Your SharePoint Site

Now that you've gotten to SharePoint, the fun stuff begins. We are going to start by creating a SharePoint page. Now, your home screen may look different than mine because you may already be part of different groups, or you may have no groups at all.

In order to create a SharePoint site, click on the create site button right here.

For this tutorial, we're going to create a team site, so click on that.

Create a title for your site. This can be changed later. If you have an idea for a team site you want to create, name it that. Or just do Test 1 or something. (I'm going to do Test 42 because I've been doing a lot of these.) You can also create a description that will be sent out to your team members if you want.

I would suggest keeping the privacy settings as private where only members can access this site, because under public from understanding, otherwise anyone in OWLSnet can view this site from my understanding. So again I would suggest keeping it private. Select a language, and then click Next.

You can add people to your group right now. Keep in mind you can always add and delete people later. In order to add owners, if they are OWLSnet members, all you have to do is type in their names and their email will pop up. Let's say I want to add Tracy. All I have to do is type in her name and click on it and she's been added as an owner. Same thing for members.

There are some differences between members and owners and I will go over that later. For now I'm going to take them off. Again, you can always add people later. Then I'm going to click "Finish."

The next screen you see should look something like this. We'll talk about how to edit this in the next module. Your task for this module is to go to SharePoint, and create a new site.

Module D – What's on Your Site and Editing the Navigation Bar

Before I talk about how to edit your SharePoint site, I'm going to talk about what is already on here. On the left you have a navigation bar you can use to jump to different pages. Click "Home" to get to this current screen. This is the home screen. If you get lost, click "Home" to get back to this page.

Conversations will bring you to your email. SharePoint Automatically creates an email group for the people on your SharePoint site. You can also access your work email from this tab. To get back, either click the back button or click the group of squares and click on SharePoint and then click on your SharePoint site. Documents is where you can upload or download your documents. I will talk about this more a little later. There is an entire module that talks about documents. If you use the Notebook application you can access it here. As you can see, Pages refers to the site pages. Site contents is where you can find site usage information. There is a recycle bin. If you delete something, that's where it will go.

And the edit button allows you to move, edit, and delete the links on the navigation bar. Let's say I would want to change the Conversations tab to say Email instead. First I click on Edit. I click on the three dots, then click edit. Here, I can change the name, click okay, and then click save.

I can also add to the navigation bar. I have to upload documents to Weebly a lot, so I want to add Weebly to this navigation bar to make my life easier. First, I click on the "Edit" button on the bottom of the Navigation Bar. Then I hoover in-between two of the tabs until this bar with the plus shows up. Click on the plus symbol/bar. The "Add a Link" box will open. If you are adding a URL, leave the option box as URL. If you are adding something else, choose the appropriate option. Type in the URL and Display name. Then click "Okay," and "Save."

Your task is to take a few minutes to play around with the navigation bar. Click on all of the links to see where they lead you. If you know of a link you use often, add it. If you know you will never use one of the links, take it off. At the very least, rename one of the links. For example, I think "Email" makes more sense to me than "Conversations"—rename this.

Video E – Other Aspects of SharePoint

Okay, a couple of other things I want to point out before we get to the nitty gritty. Another way to get home is to click on the site image here. If you click on that, it should bring you to the homepage. You can either click on that or the Home button in the navigation bar. If you hover or click on the group name,

it's kind of like the settings button where you can see the information about the group and even edit a few things.

I'm going to jump over to another a group just for a minute so I can show you what it looks like when there are multiple people in the group. You can see in the top right corner that there are five people in this group. If I click on the "5 members" it will give me the full list of group members. This is where I can add, remove, or change level of ownership for members. To add members, click on the blue "Add members" button. It's the same search bar as when I first started the site so all I have to do is type in the person's name in OWLSnet and the name should pop up. Click on the name, then click save.

 To change status, click below the person's name where it says "member" or "owner," and click on the appropriate option. I can remove a person from a group or I can change their permissions from a member to an owner and vice versa. An owner can view, add material, and change the SharePoint Site. They can actually move things around like we were doing on the navigation bar and edit the home screen. Members can view the site and change content on the site, but cannot make changes to the site. If you have a document you share on the with them, they can make edits to that. But they can't change elements on the site. So keep that in mind as you are assigning membership to your group members. You can add people from outside the organization (OWLSnet), but they can only be added as Guests. Guests can view the site but cannot make any edits to the site or to the documents.

Finally, the following star means that it will show up in your Office 365 homepage. If you create a site you will automatically follow it. If you get added to a group, you will need to click this star to follow the group. You must be following a group in order to move or copy files, so I highly suggest you follow groups. In order to unfollow a group, just click on the star again so it is empty.

Task: Review where the "setting" tools are on your SharePoint site. Try adding or removing a member from your group. Just be aware that when you add someone they will get an email notification that they have been added to your group.

Module F – Editing the Site

Finally—the fun part! Every new site you create will look like this, but the good news is you can manipulate and personalize this site. Let's say for example you don't want to have this News section right on the top. First, click the edit button in the top right. You can see that opens a publish button, as well as some options here to the left. They include Save as Draft, which means the draft will save but not be published until you click on publish; Discard Changes which means that it will revert back to whatever you had before you clicked edit, and Page Details, which is only necessary if you are interested in creating and getting page and site information.

Now hover over the section you want to edit. A little black box should appear to the left of the section. The first option (the pencil) is to edit the web part. The second option (the arrows) allows you to move the web part. And the last option (trash can) allows you to delete the part.

If you click on the edit tool, a box will pop up on the right with different options. These options may vary depending which part you are editing. It's going to be different for News, for Quick Links, for Documents, and so on. Because we are editing the News part, the first option is where to get the news

from. Make the changes you want, then click either "Save as Draft" or "Publish" to save. For this example, I will change the layout and click "Publish." As you can see, the layout has been changed for the News section.

The next option is to move the section. Click "Edit." Click and hold the arrow buttons, then move the section to where you want it. In this case, I will move the News section to the right. Remember to click "Publish." The News is now to the right above Quick Links, and there is an empty space where News used to be.

Finally, to delete the web part, click on "Edit." Hover over the part that you want.Then click on the trash can. You will need to confirm that you want to delete the part. You can always add a part again but your information will not be saved. For example, if I had saved a link to the New York Times in the News section and I deleted the section, I can always add the News web part back again. However the New York Times would no longer be saved so I would have to add it again. In this case, I will delete it. Then, click "Publish."

To add a new web part, click on edit, then hover in the area you want to add to until you see the line with the plus sign. Like in the navigation bar, click on the line/plus sign. As you can see, there are many options of what to add to your page. For simplicity's sake, I am just going to add the news section back, but play around and see what's in there. Click on what you want to add. Then click "Publish."

Your task is to play around with the editing functions of the page. An easy task is to remove the News section from your web page, then add it back.

A more challenging activity is to switch the position of the News section and the Documents section. Then, add a divider between the News and Activity section.

Also, spend a few minutes looking at the different options of what you can add to your page.

Module G- Uploading and Editing Documents

 In this section I'm going to talk about how to upload and edit documents in Office 365, which is what SharePoint uses for documents. If you already know how to do this, feel free to jump to the next module. I should mention that this is what most people use SharePoint for—uploading and sharing documents.

If you add a document to SharePoint, everyone who is an owner or member of the site will be able to edit that document. To add a folder or a document, go to the Documents Section and click on "Upload" and then "Files." Double click or click and hit open the document or folder you want. You can see that it is uploading, and there it is. You can also upload documents from the home screen if you have the documents web part on your home screen. You can add Documents, or delete this, or make it the only thing on your home screen if you want. For full functionality, I'm going to go back to the Documents section.

In order to view or edit the document, click on the link. This will lead you to the online version of your document. I can either edit it in Word with the full functionality of Microsoft Word (an offline version), or I can edit in browser making quick changes right here. This is an online version and will automatically

updated. I can type on it, I can edit it. You can see that it is saving automatically. Multiple people can be working on this at the same time and you can see those changes in real time. However, it doesn't have the full functionality of Word and sometimes the formatting is a little funky. So make sure you always check the formatting in Word before you print something off.

To have the full version of Word, including formatting and getting an idea of what the final document will look like, open in Word by clicking "Edit in Word." Click "Yes." Here we are in the full version of Word. You will now be working on an offline version of this document.

Once you are in the full version of Word, aka working on the document offline, you will need to save like normal. You have your save button here like usual. Notice the two arrows going in a circle by the save button. If you see this, then it is being saved to Office 365 and your SharePoint group. If you don't see those arrows, then you're not saving to SharePoint. Be sure to save frequently, otherwise your edits won't save. I'm going to save it, and my edits are being shared to SharePoint.

When you are in the full Word version (aka working offline), other users still can make edits to the document but the edits aren't in real time. If there are others editing the same document, they won't be able to see your changes while you're offline. When you go back online, you'll be notified of any changes that are available, and others will see that you have changes. When you are done, save, then close out of the document like normal.

Your task is to upload a document from your files (note: you will need to upload a document from your work computer or files in order for it to work properly.) Once you have uploaded the document, open it. Write a sentence in the online version. Then, open it in Microsoft Word. Add another sentence and save. Close out of the document. Open the document again in SharePoint to make sure both sentences saved.

Module H – Creating a New Document and Pinning a Document

To create a new document, click the "New" button in the Documents section. Choose what you want to create. I'm going to do a Word document for this.

It automatically opens. Click on "Document" to rename the document. It will save automatically if you are in the online version. If you want to change your title, just click on the title and make your changes. If you are in the full Word application, you will need to press the save button.
Close the document and double check that the document was saved and renamed in SharePoint. You may have to refresh the page to check this.

If you are working on a document and you want easy access to the document or folder, you can pin the item to the top of the documents section. You can pin or unpin an item at anytime.
In order to pin an item to the top for easy access, click on the three dots next to the title of the document. Click on "Pin to top" near the middle of the options list. As you can see, it has been pinned to the top. This means that no matter what other documents I add, they will add to the bottom and this will remain on the top, until or unless I unpin it.

There are many options for moving, copying, notification, and so on for each document or folder.
Your task is to create a new document, title it, and pin it.

Module I – Other Possibilities

Now that you know the basic building blocks of SharePoint, I wanted to talk about some of the possibilities for using SharePoint. There is a lot to it and you can tailor it to your needs. One thing you can do is use the Plan tool to assign roles and reminders. There's the plan tool under New. Let me name this. You can assign tasks to different people. Once they are assigned tasks, it will send them email reminders a week, and a day before the tasks are due. If they haven't completed the task, it will send like overdue notices saying "Hey, you haven't done this task yet." You can also keep track of the task in the Charts area. What it does is looks at the different tasks and says for example, 1/9 tasks has been completed. You also have a To Do list and a Completed list over here. Kind of handy for planning a project.

Another possibility is to use SharePoint as a one-stop shop. I'm going to jump over to a different site to show you what that looks like for me. I have this folder I have created for our staff. For example, when I create the meeting agendas, I need to upload them to Weebly and email the agenda out. I can create the agenda in my documents in SharePoint so everyone has access to it. If Tracy has any edits to it, she can make those and it will all be saved automatically. I also have my email connected, so I can open that all up in one spot rather than having multiple things open. Finally I have Weebly (which I have saved as a link to the homepage) to upload the document to the NFLS website, and check that it uploaded correctly to the site by clicking the NFLS website link, which was also saved as a link on the homepage—all from my SharePoint page. Rather than jumping around to different links and my email, it is all located in one spot.

Another thing you can do is create different sites for different groups to protect privacy levels. For example, Tracy and I recently updated the employee handbook. This was a project that only the two of us needed access to, so I created a different site for just the two of us. Then I created a site for the whole office for other documents, such as our meeting notes and strategic plan. Everything is updated automatically and the whole staff has access to it.

Those were just the ideas that I can think of. There are other possibilities out there. You could create a social page or site for your employees where they could post news, recipes, and other things instead of clogging up your email. You could even create a page for your patrons if there are documents and news you want to share with them. They would be able to view everything but not edit it.

Finally, I wanted to mention that there are ways to customize your SharePoint site. It is limited but I did want to mention it. Click on the settings tool, than scroll down to "Change the Look." This is why, I'm sure you've noticed, the button colors are different. Choose the theme you want, then click "Apply." Your task is spend a couple of minutes brainstorming idea possibilities for your SharePoint page. (Yes, I'm giving you permission to brainstorm and just think for a few minutes at work.)

Also, find the settings tool and play around with the customization of your site.

Module J – Summary

Our learning objectives for this tutorial were:
•To understand what SharePoint is

- To be able to create a SharePoint site
- To be able to upload documents to SharePoint and share the documents with other users
- To feel comfortable enough with SharePoint to explore possibilities and try out new things on SharePoint

Hopefully you have a better understanding of what SharePoint is and have ideas about how you can use it to make your workflow easier.

This tutorial is set up for you to go back as often as necessary. If you can't remember how to do something, go back to the appropriate module and rewatch it. Also feel free to contact me if you have any questions! As with any new tool, the best way to learn it is to play around with it. So, feel free to explore and find out how else SharePoint can make your job easier. If you find any cool things, or want a short tutorial on something, let me know! Thanks for participating. I hope you find SharePoint to be useful to you and your staff.

Thank you for participating! Give yourself (or your cat or your coworker) a high five for your good work.