

Getting Started with SharePoint Online

Worksheets and “How to” details



The small print

Prerequisites

Time in the workshop is precious – it is an opportunity for you to interact with the workshop leader and other participants through questions and discussions and to share your experiences and concerns. To make the most of this time we sometimes ask you to carry out learning activities ahead of the workshop so that everyone comes into the class with the same basic knowledge. We keep this prior learning to a minimum and often make use of online videos. Online videos provided through LinkedIn Learning can be accessed free of charge by University members anytime, anywhere, through a browser or app.

Your course booking will tell you if any prior learning activity is required. If you don't have an environment where you can do this learning, you can come along to one of our LinkedIn Learning sessions. These are a quiet space where you can work through videos or other workshop resources.

If you arrive for a workshop without having done the prior learning, the workshop leader may suggest that you come back on another session.

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About the workshop designer

Phil May has been working in educational IT and the private sector for over 35 years. With over 20 years of experience with SharePoint and 6 years of experience with SharePoint Online, he is part of the Nexus Team in IT Services who maintain and support the Office365 environment at the University of Oxford (known as Nexus365). Phil has extensive expertise in SharePoint, Microsoft Teams and other N365 services and strongly believes that "there's no such thing as a stupid question". In his spare time he knits, plays videogames, draws and paints, and loves hiking in the wilds of the Peak District, Cornwall and Wales.

Revision history

Version	Date	Author	Comments
1.0	February 2024	Phil May	None

About this workshop

This workshop aims to give you a head start in the use of SharePoint Online, the University's cloud-based version of Microsoft's SharePoint collaboration service. You will gain experience in the use of all aspects of a SharePoint site including how to navigate around your site, how to create content, conduct searches and – most importantly – share your site and its content with others.

What you will learn

We will discuss what each part of a site does, and how to make the best use of the extensive features of SharePoint within your own units including setting up your site, adding content to existing libraries, creating new libraries and lists, editing modern pages and adding news to your sites, and lots of tips and tricks to help you become a SharePoint champion in no time at all.

What you need to know

Though most features covered by the course will be available to all SharePoint site users at every permission level, some tools will only be available to Site Owners or Site Admins. We will explain where and when these features require higher-level access to sites. Your own unit sites may be heavily edited or changed away from the standard 'look and feel' of a newly created Team site but the essential mechanisms will be the same as the service only supports "Out of the box" SharePoint and no customisation or external apps.

I will assume that you are reasonably confident in using a web browser to navigate around a website. SharePoint is much more than a web site, of course! I will also assume you have an understanding of:

- Working with text editors (WYSIWYG editors)
- Creating and saving documents, spreadsheets, or PowerPoint presentations
- Understanding what permissions are for and what they can offer in SharePoint sites
- How to sign in to Nexus365 using your choice of 2nd Factor authentication

If you need to review these activities, LinkedIn Learning is a great place to get guidance. There is an activity with relevant videos in the IT Learning Portfolio: visit skills.it.ox.ac.uk/it-learning-portfolio and search for SharePoint Online.

The resources you need

Training sites are provided as part of the course. No documents will be provided, but you can generate your own from within a site. All training sites and content will be deleted / recycled without notice after 5 working days giving you some time with your training site after the course finishes to 'sandbox' and follow additional training.

The resources for most workshops, including any pre-course activity, are in the IT Learning Portfolio: visit skills.it.ox.ac.uk/it-learning-portfolio and search for SharePoint Online

Unless you have been told otherwise, in classroom workshops there will be a computer available for you to use with a selection of browsers installed. SharePoint will work with the majority of modern browsers on various platforms including Mac and Linux but Windows PCs will be used for the training. **If you do bring your own laptop or device, please ensure that it has an up-to-date browser installed.**

Learning Objectives

This workshop has the following learning objectives:

- Learning Objective One: Familiarise the user with navigating around a SharePoint site
- Learning Objective Two: Familiarisation with key components in a SharePoint Online Team Site
- Learning Objective Three: Familiarisation with permissions and sharing in SharePoint Online
- Learning Objective Four: Creating and editing Modern SharePoint pages and news articles
- Learning Objective Five: Familiarisation with the various methods of adding and creating content within a SharePoint site
- Learning Objective Six: Familiarisation with changing the look and feel of a site, accessing help and a discussion about SharePoint use cases

Further information

Getting extra help

The Nexus Team maintains a community team (The Nexus User Group or NUG). This can be joined at any time using the code LNJVOFR when you click “Join or Create a Team / Join a Team with a code” in MS Teams, or [via this link](#).

Study Videos from LinkedIn Learning

On our website, you will find our collection of self-service courses and resources. This includes providing LinkedIn Learning video-based courses free to all members of the University. Visit skills.it.ox.ac.uk/linkedin-learning and sign in with your Single Sign-On (SSO) credentials.

There is also a Nexus Team recommended collection of courses in LinkedIn Learning. You can view the collection via

<https://www.linkedin.com/learning/collections/712249771080855521?u=76177458>

Some courses recommend pre- and/or post-course activities to support your learning. You can watch the online videos anywhere, anytime, and even download them onto a tablet or smartphone for off-line viewing.

About the IT Learning Portfolio online

Many of the resources used in the IT Learning Centre courses and workshops are made available as Open Educational Resources (OER) via our Portfolio website at skills.it.ox.ac.uk/it-learning-portfolio.

Find the pre-course activity for this course in the IT Learning Portfolio: visit skills.it.ox.ac.uk/it-learning-portfolio and search for “[long documents] activity”.

About the IT Learning Centre

The IT Learning Centre delivers a programme of digital skills courses, which are provided in our teaching rooms and online, and we give you access to thousands of on-line self-service courses through LinkedIn Learning.

Our team of teachers have backgrounds in academia, research, business and education and are supported by other experts from around the University and beyond.

Our courses are open to all members of the University at a small charge. Where resources allow, we can deliver private courses to departments and colleges, which can be more cost-effective than signing up individually. We can also customize courses to suit your needs.

Our fully equipped suite of teaching and training rooms are usually available for hire for your own events and courses.

For more information, contact us at courses@it.ox.ac.uk.

About IT Customer Services

The IT Learning Centre is part of the Customer Services Group. The group provides the main user support services for the department, assisting all staff and students within the University as well as retired staff and other users of University IT services. It supports all the services offered by IT Services plus general IT support queries from any user, working in collaboration with local IT support units.

The Customer Services Group also offers a data back-up service. Customer Services is further responsible for desktop computing services – for staff and in public/shared areas – throughout UAS and the Bodleian Libraries.

Course “How To” pages

The following pages offer a visual reference guide on how to perform most of the tasks discussed in the classroom exercises. If you get stuck at any time, or can't get the trainer's attention, refer to each of these pages to see how to perform each task in detail.

Section 1: Getting Started

Exercise 1: Logging into your SharePoint Site for the first time.

- 1) Start up your choice of web browser
- 2) In the address bar, type in <https://unioxfordnexus.sharepoint.com/sites/trainingxx> (where xx is the training site number you were allocated for the course).
- 3) You will see your Training Team Site:

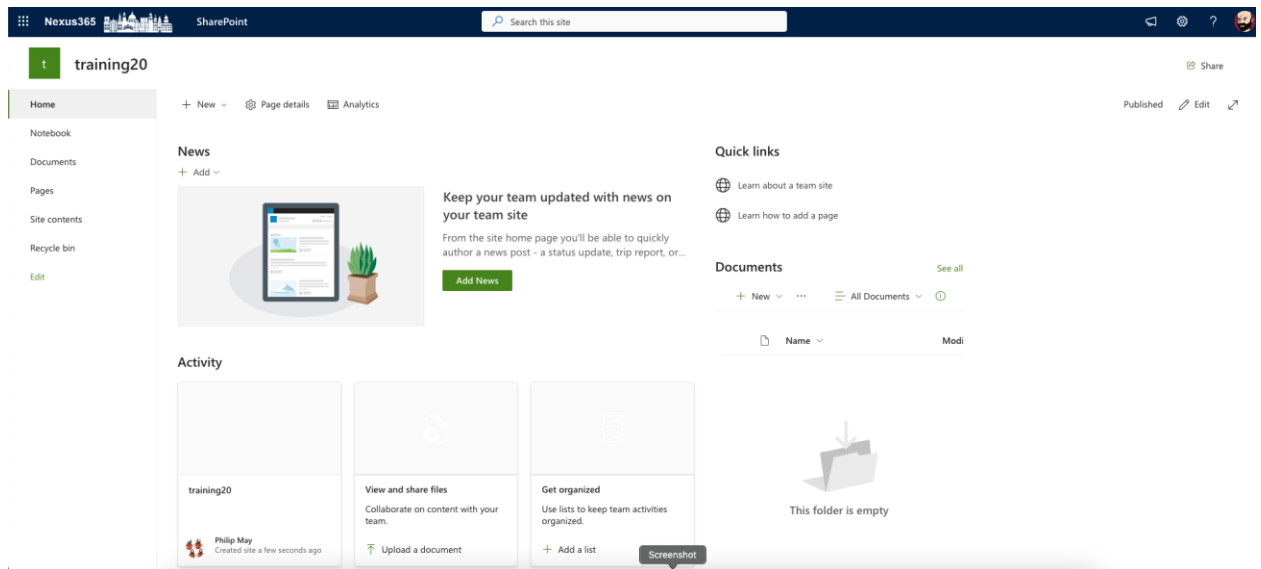


Figure 1 - Your Sharepoint Team Site Home Page

Exercise 2: Navigation options – how to get around your site.

The Team Site Home Page



The screenshot shows the SharePoint interface for a team site named 'training20'. The top navigation bar includes the site name, a search bar, and user profile icons. A left-hand quick launch menu lists options like Home, Notebook, Documents, Pages, Site contents, Recycle bin, and Edit. The main content area features sections for News, Quick links, Documents, and Activity. Annotations with blue arrows point to the 'Home' link in the left menu, the 'Share' button in the top right, and the main content area.

This is the LEFT-HAND QUICK LAUNCH MENU. Above it is your site name and icon.

This is the SITE SETTINGS MENU (also referred to as the “COG” MENU).

This is the MAIN PAGE BODY. This usually contains Web Parts to display your site content or keep your visitors up to date with site changes but can also contain extra navigation options and links.

Figure 2 - Site navigation options in a SharePoint Team site

Use the indicated navigation options shown above to navigate around your site. Remember, at any time you can return to the “Home Page” (this page) by clicking the “Home” link in your left hand quick launch menu, or by clicking on the icon next to your site’s name in the top left hand corner (the green icon next to “Training 20” in our example above).

Exercise 3: Key components of your site

Your site components can be found under “Site Contents”. Click the “Cog Menu” as shown in Figure 2 above. Then select “Site Contents” to view all the components and content in your site:

+ New ▾

Contents Subsites

Name	Type	Items	Modified
Documents	Document library	7	23/10/2023 12:16
Form Templates	Document library	0	30/08/2023 11:03
Site Assets	Document library	5	25/09/2023 10:50
Style Library	Document library	0	20/08/2023 01:03
Issue tracker	List	0	23/10/2023 12:19
My Test List	List	0	30/08/2023 14:18
Test Calendar	List	7	11/10/2023 16:00
Events	Events list	0	25/09/2023 10:50
Site Pages	Page library	17	23/10/2023 11:26

Figure 3 - Your site contents page showing all the content and components of your site

Each of these content areas or components serves a purpose in your site. Some can be freely changed or added to, some should not be changed or altered.

For example:

Documents is a document library created by default in team sites. You can create extra document libraries to suit your own tastes so you don't have to use just one in your site

Lists (like “My Test List”) are user created. New lists can be created by site owners and members, and existing lists can be edited and changed.

Containers like the “Site Assets” and “Style Library” should not be altered or deleted as these are where SharePoint keeps vital components of your site's framework and working parts.

Form Templates are a deprecated feature and don't really serve any purpose, but equally should not be altered or deleted

Site Pages are where SharePoint keeps all your modern SharePoint pages, news articles and news links. Unfortunately you only get one page library per site so make the best of it!

One additional note. SharePoint modern sites do not contain subsites and we do not support the use of them in the Nexus365 environment. Sharepoint is designed to use a flat architecture model of SharePoint Hubs and SharePoint hub-joined or standalone sites. You can learn more about sites and hubs here: [SPO QRG - Developing a strategy for moving to SPO \(ox.ac.uk\)](#)

Exercise 4: Using the search options in your site



Figure 4 - The site-wide search bar

The Site Search is available from your site's home page (the search box in the middle of the bar shown above). This is the SITE WIDE search and will search through all the content in your site.

Libraries and lists also have their own (narrower) search options.

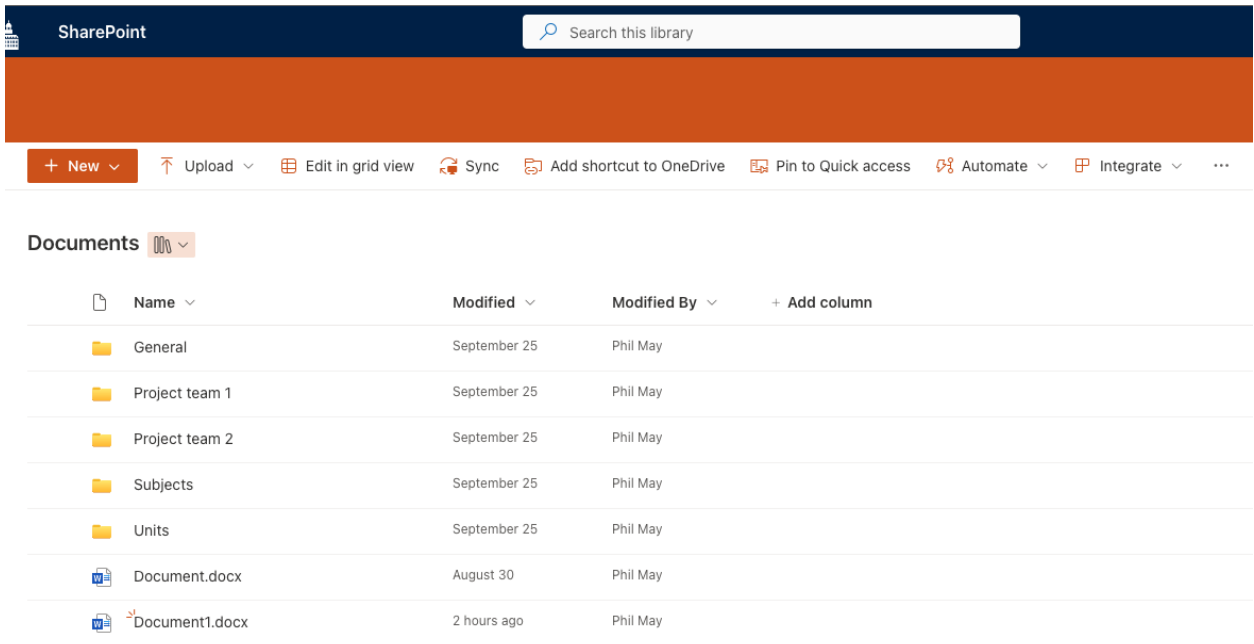


Figure 5 The search bar in a document library

The above image shows the search bar for a document library, which narrows the focus of the search operation down to just that library. The same type of bar would also be available in site lists and would similarly narrow the focus of search to just that list.

Section 2: Sharing and Permissions

Exercise 1: Sharing your site

Navigate back to your home page.

Click on the Cog Menu (shown in Figure 2 in the previous section) and select “Site permissions”

Look for the “Share Site” button:

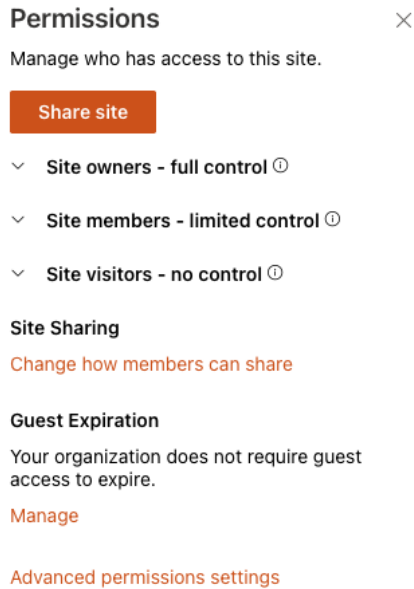


Figure 6 - The “Share Site” button under the Site Settings > Site Permissions menu

Click the “Share Site” button for the sharing menu:

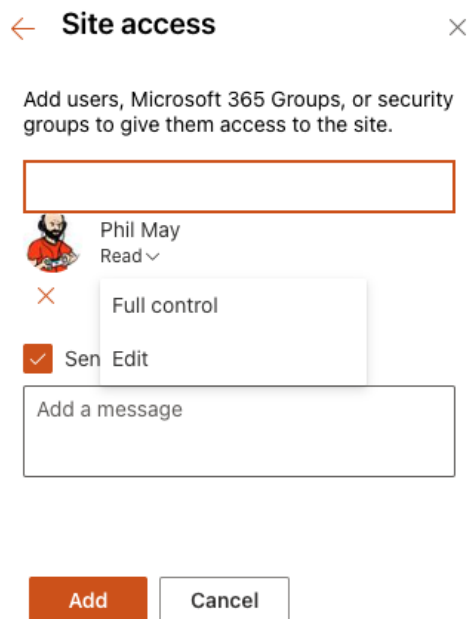


Figure 7 - The sharing menu for site access

Type in someone's email address, or their name (if you can be sure it's unique). Once the person has been suggested, pick the level of permission you want to give them (Read = read only, Edit = read / write, Owner = Site Owner)

Tick or untick the box to add an email message and send a sharing link to them (we always advise that you UNTICK this box when testing or playing).

Click the "Add" button to add that person to your site with the level of permission you chose.

Exercise 2: SharePoint Site Groups

Your SharePoint Site groups can be found by clicking the “Cog” menu (see figure 2) then selecting the “Site Permissions” menu, then the “Advanced Permissions Settings” option:

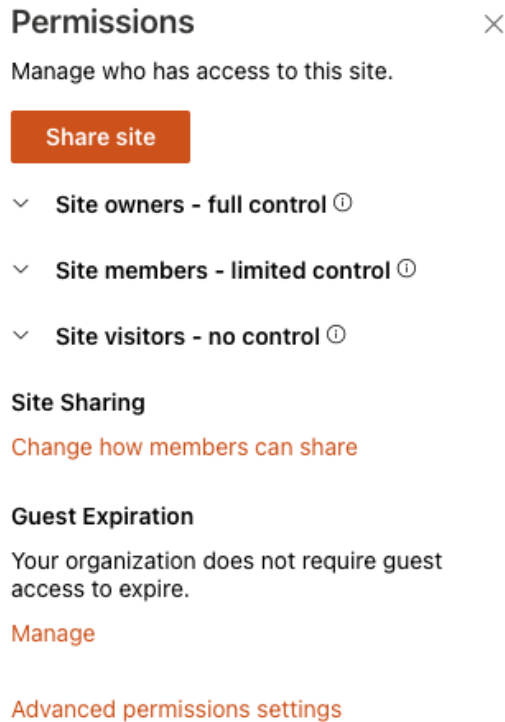


Figure 8 - The Permissions > Advanced Permissions Settings menu

You will then see all your site groups:

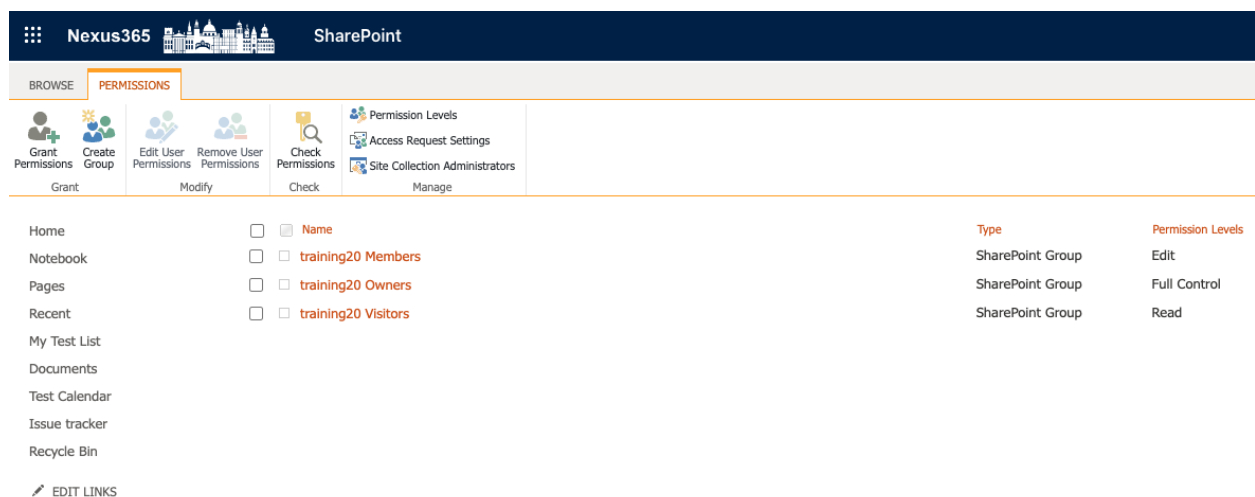


Figure 9 - Your SharePoint site groups (Members, Owners, Visitors)

Site Members: Have read / write access to your site

Site Owners: Have a high level of access to your site and can change permissions, create content, approve or decline access requests etc.

Site Visitors: Have read access to your site, and can also download documents but cannot add or edit content in your sites

Exercise 3: Permissions Micromanagement

Micromanaging permissions at the item level usually involves using the “Context” menu (three dots, normally shown next to a file name or a list item). Here are some examples of context menus in a Document Library (shown below next to a document):

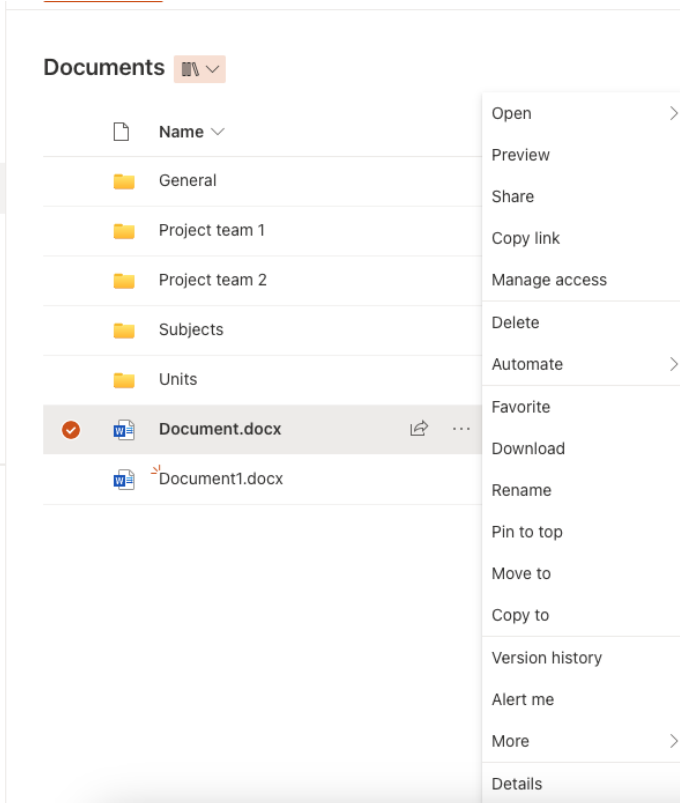


Figure 10 - The context menu next to a document in a library

Clicking the “Share” button in a context menu allows you to share JUST that item with someone if you don’t want to give them access to any other part of your site.

Context menus can also be found in lists:

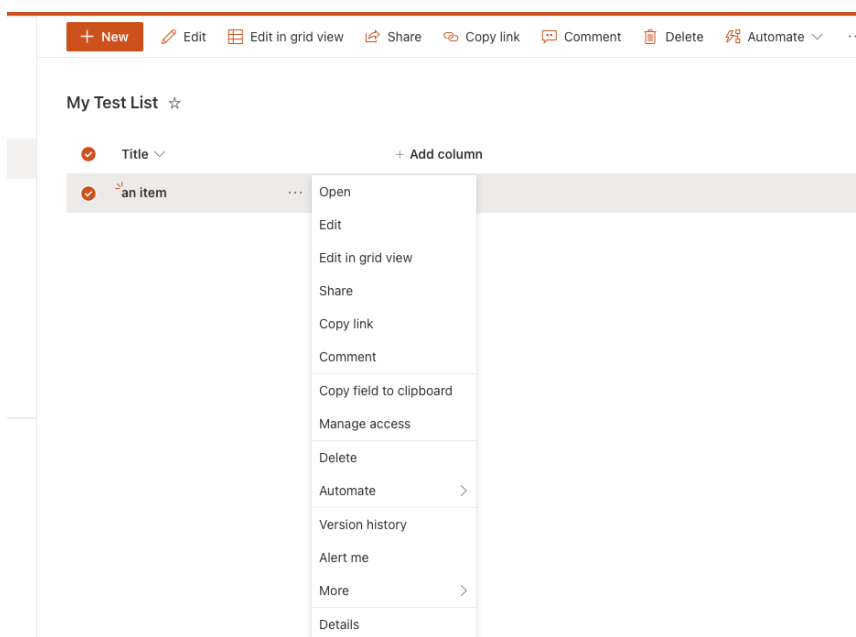


Figure 11 - The context menu in a list item with the same options you'll see in your document libraries

The Permissions Ribbon (See Figure 9 above for where this ribbon is situated).

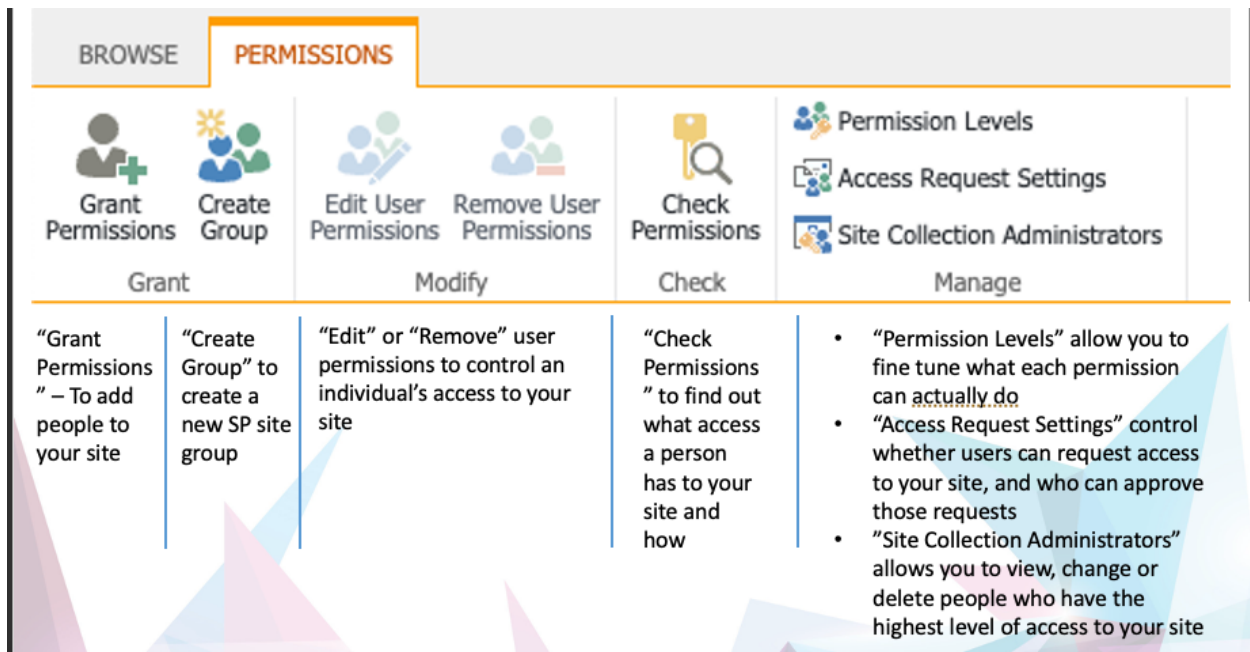


Figure 12 - The Permissions Ribbon in detail

When you view your SharePoint site groups, you will also see the Permissions Ribbon at the top of the screen. This is a throwback to previous versions of SharePoint but it still used in SharePoint Online.

The ribbon has many useful features that also appear elsewhere in your site, but if you get used to visiting the SharePoint Groups screen for managing your site users, you'll become accustomed to using this ribbon.

To summarise the functions above:

- Grant Permissions – Used to add people to your site at different permission levels.
- Create Group – Creates a brand-new site group (if you don't want to use the three standard groups you get with your site).
- Edit User Permissions – Change the highlighted user's permission levels.
- Remove User Permissions – Removes the highlighted user's permission levels entirely.
- Check Permissions – The most useful tool in the ribbon. Click this, type in someone's name or email address to find out exactly what permissions they have in your site.
- Permission Levels – Allow you to change the default permission levels and fine tune what they can do (it's always a good idea NOT to touch the basic permission levels in your site but to create new ones).
- Access Request Settings – If you switch these on in your site, users who have requested access to your site will be approved or rejected here.
- Site Collection Administrators – Shows those with the 'top level' of access to a site. You can add or remove people from the list if you are a site collection admin.

Exercise 4: Permissions Dos and Donts

Permission Dos

- DO start off simply. Use SharePoint Site Groups to control permissions to things rather than using “Lazy Sharing” or assigning permissions to individual files, folders or pages.
- DO understand what permission levels each SharePoint group has. Owners “Own”, Members “Read and Write” and Visitors “Read”
- DO consider creating specific separate sites for specific purposes and limiting access to those sites for sensitive or secure data.
- DO use the “Upside Down” model of assigning permissions. Give broad access to your site so people can navigate around it freely, only ‘locking away’ things that need to be locked down.
- DO consider preventing Site Members from being able to share your site if you want to maintain tighter control
- DO understand how site access requests work if you intend to use them to your advantage.

Permission Donts

- DON'T try to control the permissions on every single thing in your site. It will drive you crazy!
- DON'T rely on folder structures in your document area for anything other than organisation of content. Controlling permissions at the folder level can also become an onerous task very quickly.
- DON'T assume that the use of pre-populated unit-level groups will magically grant instant access to everyone forever. They are useful as a means of adding a lot of people to your site initially but cannot be relied on to be ‘dynamic’ – ie when they change, your permissions in your site won't automatically change with them. Consider using dedicated O365 groups, Teams or SharePoint Site Groups instead.
- DON'T lose sight of any custom permissions or broken inheritance you've set up in your sites. Everywhere you break inheritance (for example by sharing an individual item, document, folder etc) becomes a new place you have to manage permissions at.

Section 3: SharePoint “Modern” Pages

Exercise 1: Your site’s home page

Navigate back to your site’s home page and click the “Edit” button in the top right hand corner:

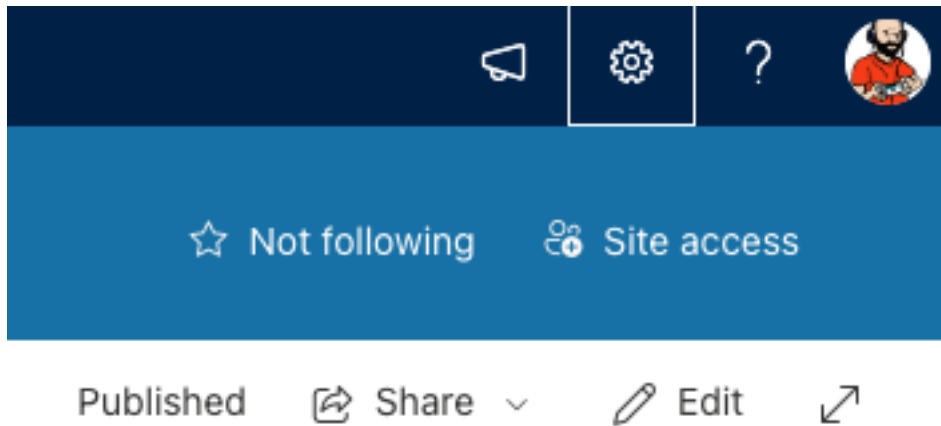


Figure 13: The "edit" link in the top right of your home page

Your site will be put into “Edit” mode like so:

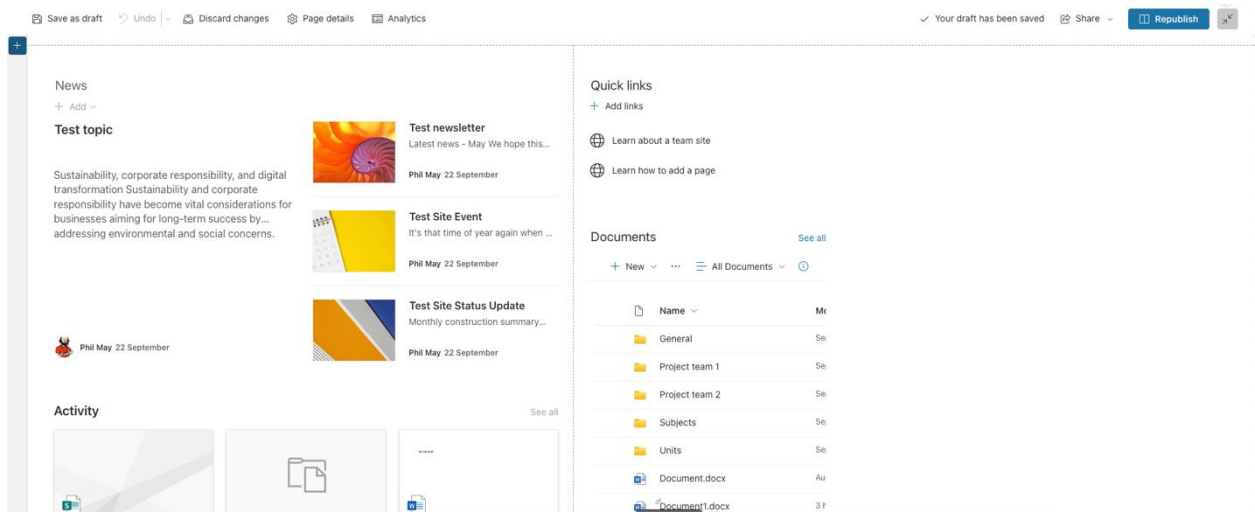


Figure 14 - A site's home page in "edit" mode

As you roll your mouse over the page, web parts (the content containers in the centre of your site’s home page) will be highlighted. Clicking on them will show their edit controls:

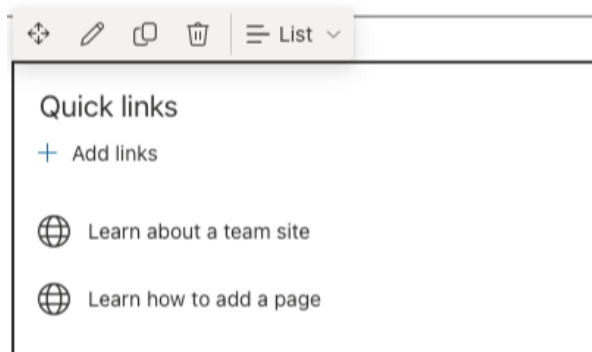


Figure 15 - A Web part's edit controls

Pages also have sections, and you can see a section control here:

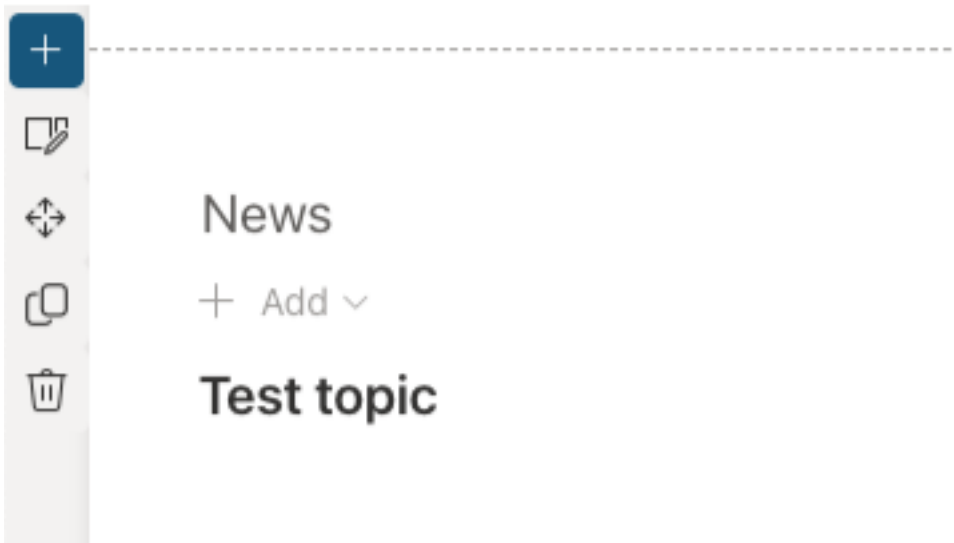


Figure 16 - Section controls in a modern page

From here you can change section layouts, edit sections, move them around your page layout, copy them or delete them.

In between web parts you'll also see section dividers allowing you to add more web parts or page elements, like in the example below:

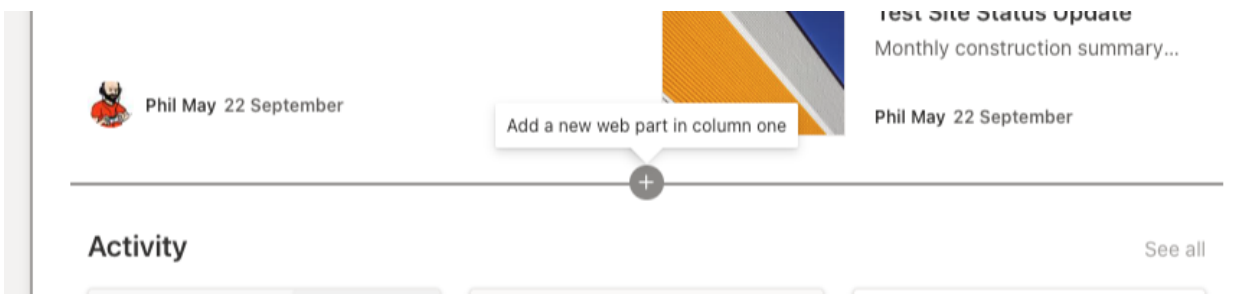


Figure 17 - The "add a new web part in column one" control

Clicking the grey "Plus" button will add a new web part to your page:

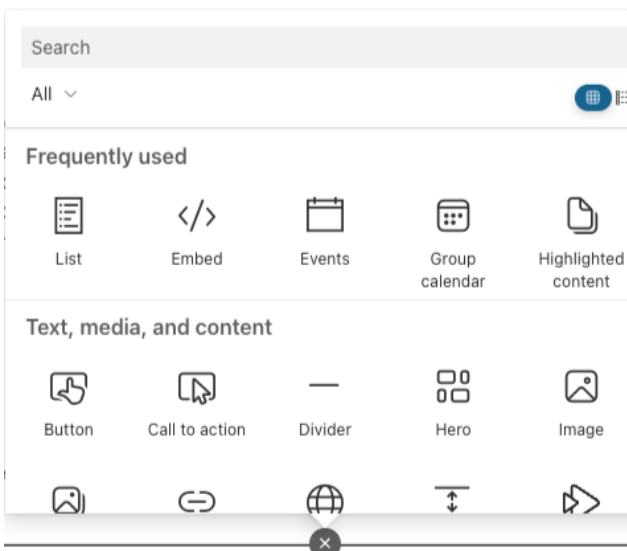


Figure 18 - Adding a new web part from the web parts menu

Exercise 2: Creating a new “Modern” page in your site

Navigate back to your home page and click the “New” button, then select “Page”:

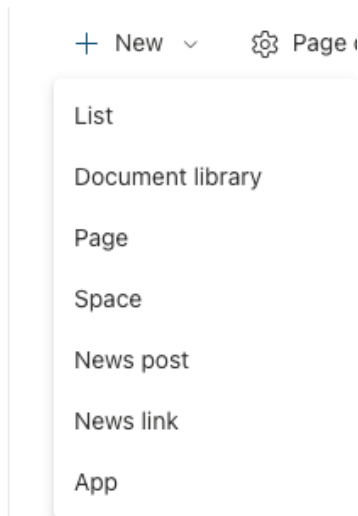


Figure 19 - The “add new” menu in your SharePoint home page

When you select “Page” you will see a sub-menu showing all the page creation options:

Page templates

From Microsoft

Saved on this site

Standard

Templates that contain the full range of web parts for general use.



Figure 20 - New page templates from the “Create Page” menu

Select an appropriate template (or blank) then click “Create Page” to start creating your brand new page. Give it a title and make changes as desired:

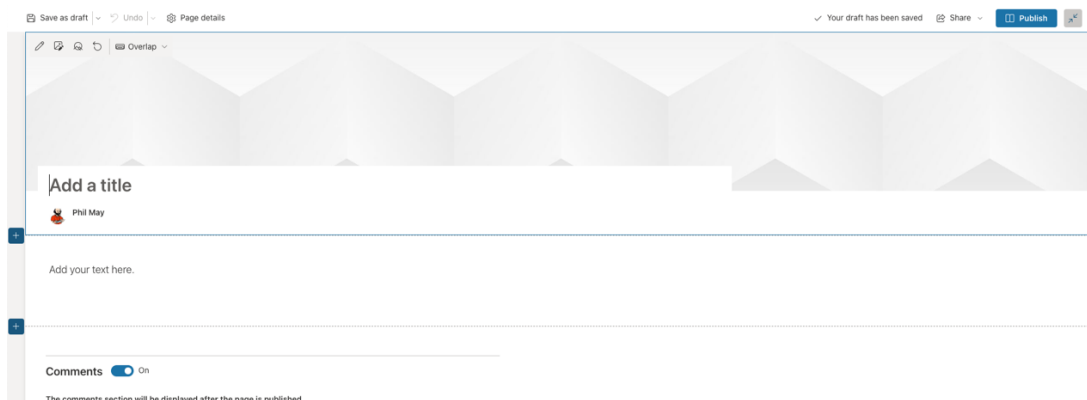


Figure 21 - Your new page is created, and shown in “edit” mode. Make changes then click “Publish” to make your page available to your site users

Exercise 3: Web parts for “Modern” SharePoint pages

Figure 18 (above) shows some of the web parts that can be added to your site. Some web parts are supported whereas others require extra licensing not available to Nexus365 users. Here’s a brief overview of the supported web parts:

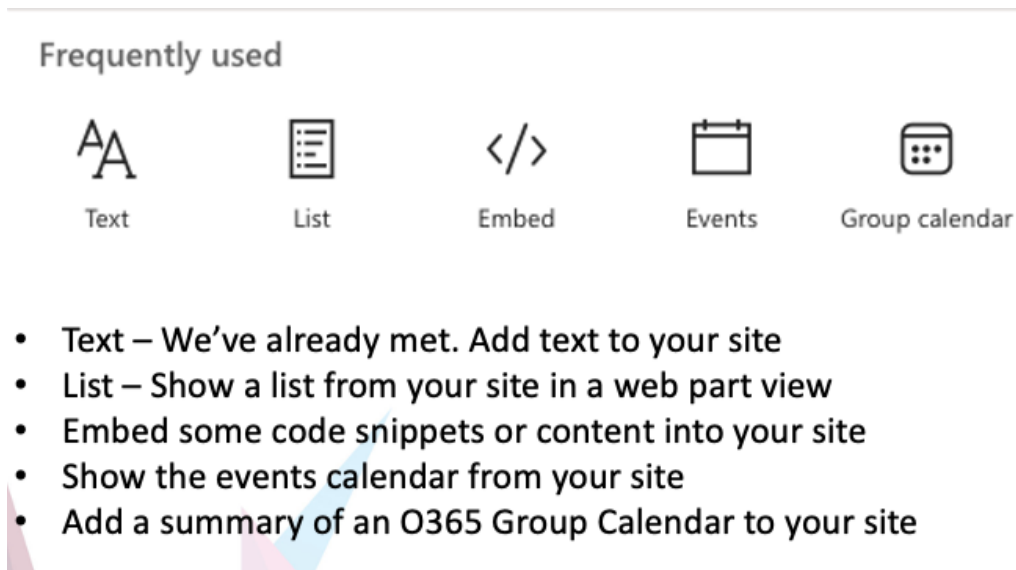


Figure 22 - The most frequently used web parts

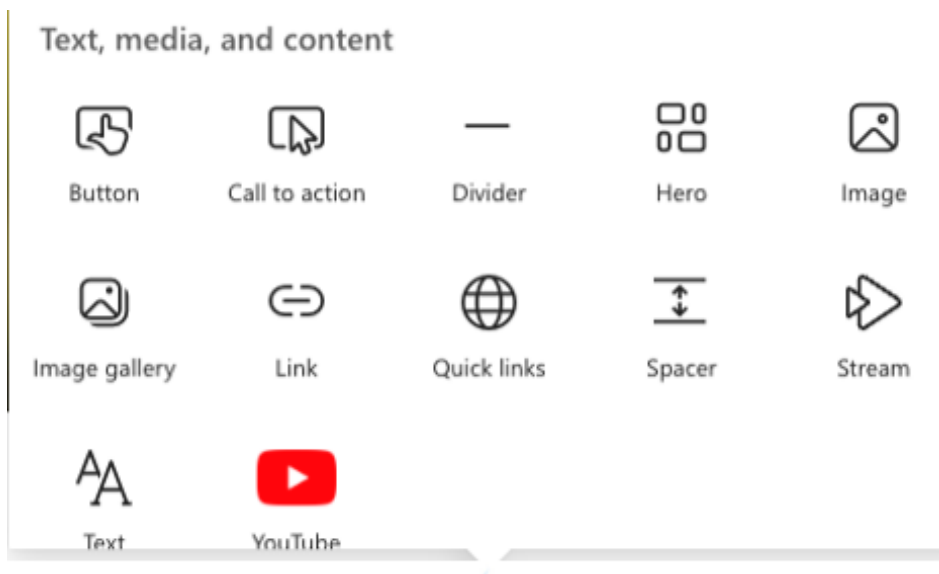


Figure 23 - Text, media and content web parts

- Button – Add a button with a link behind it to your site (with formatting options)
- Call to Action – Get site users motivated with a rallying call to do something
- Divider – Divide a page section with a horizontal line
- Hero – Create a complex visually appealing navigation web part for your site page
- Image – Insert an image in your page
- Image Gallery – Insert an image gallery into your page
- Link – Add a simple link to your page
- Quick links – Add a set of links to your page
- Spacer – Provide some spacing between web parts or sections
- Stream – Insert a Stream video from your site in a page
- Text – Same as above, add a text area to your site

- YouTube – Insert a YouTube video in your page

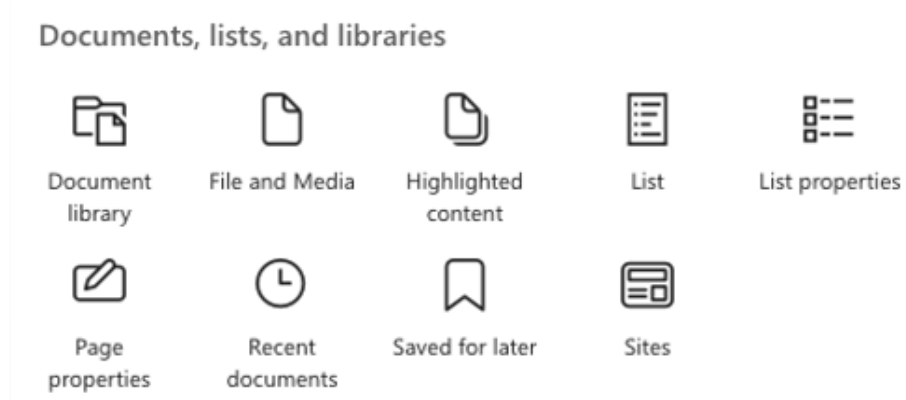


Figure 24 - The Documents, Lists and Libraries web parts

- Document Library – Add a view of a document library to your page
- File and Media – Add a view of files or media libraries to your page
- Highlighted content – A search driven web part to highlight specific content in your site
- List – Add a view of a list to your page
- List properties – Show properties of a SharePoint list in your page
- Page properties – Show some valuable stats about your page
- Recent documents – Shows recently edited or opened documents from your site's document libraries
- Saved for Later – Shows a personal bookmarks web part for content you've saved for later
- Sites – Shows an overview of sites linked to – for example – a hub site.

There are many more. Bear in mind that not all web parts will 'work' for our current licensing or are not supported for use currently so try them out before deciding to deploy them to your site.

Exercise 4: Adding a news page to your site

The news feed features in SharePoint are powerful and useful, but are essentially just like any other modern page (with a few notable differences). So let's create one.

Go back to your site's home page.

Click the "New" link and this time select "News Post"

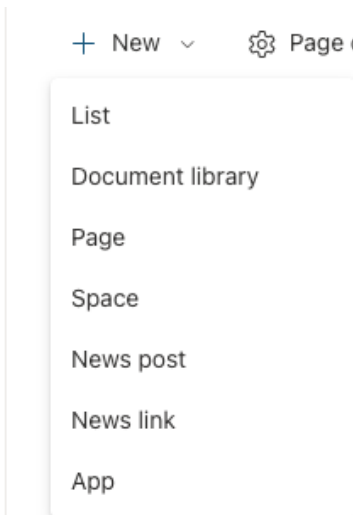


Figure 25 - Add a new News Post to your site

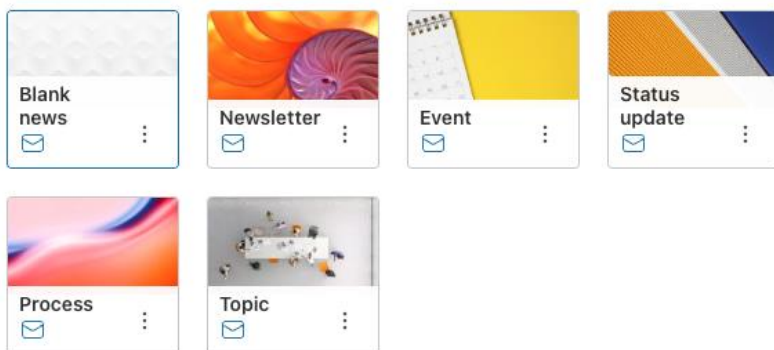
News templates

From Microsoft

Saved on this site

Made for email

Templates for sharing news as an email that looks great on any device. Fewer web parts available.



Standard

Templates that contain the full range of web parts for general use.

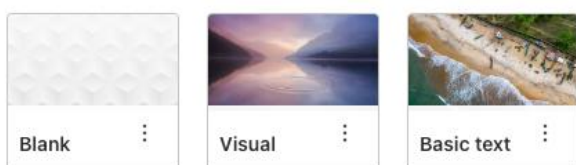


Figure 26 - The News Post template options

The "Made for Email" templates offer additional options for mail-friendly news items. The "Standard" templates are great for creating quick news items just for your site. You can use either in both scenarios.

Pick a template, click “Create Post” then finish off creating your news post:

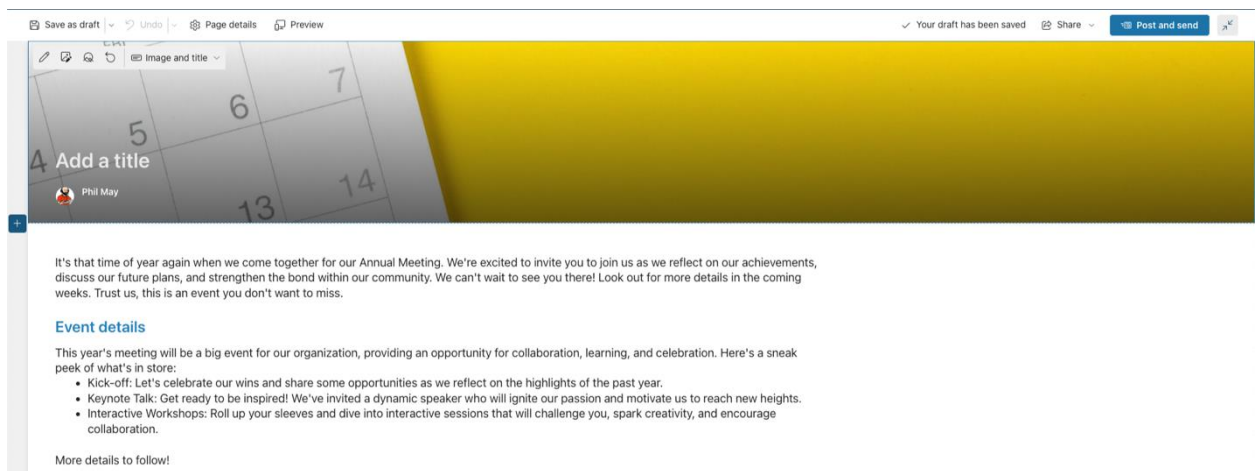


Figure 27 - Your new news post in 'edit' mode

Make changes to the text, the header image or the web parts. Once done, click “Post and Send” to view the options for sharing your news post:

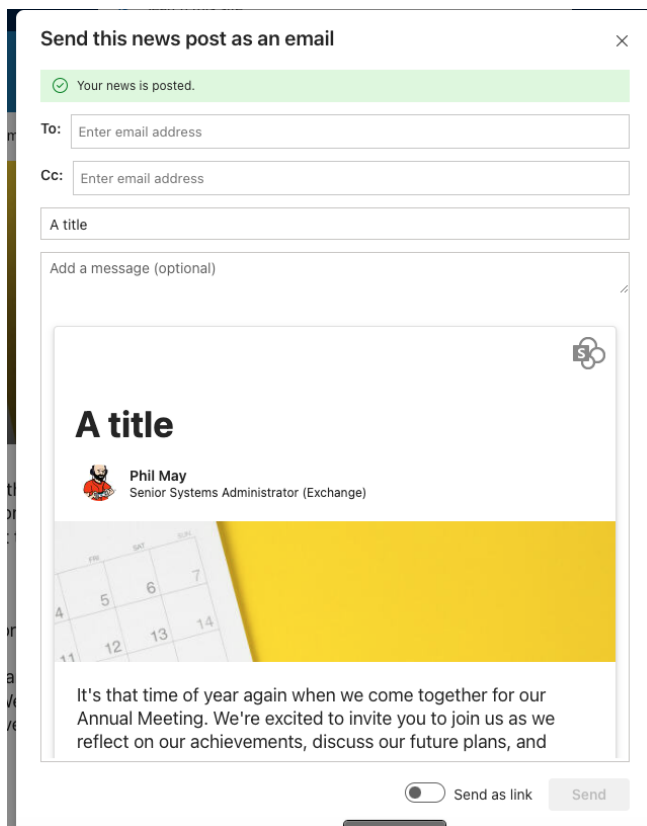


Figure 28 - The Sharing menu with email options for your post

The news article will instantly be posted to your site but the next step is optional. You can add in recipients for the news post and a summary of the article. Bear in mind that only Nexus365 addressees, groups or teams can be used here. Maillist mailing lists or other provider mailing lists are not supported (but you can always send the item to yourself, and then forward the email to one of those options if you have access to send to them.

Section 4: Content creation

Exercise 1: Create a document in your site

Go back to your site's home page, and click on the "Documents" link in your quick launch menu:

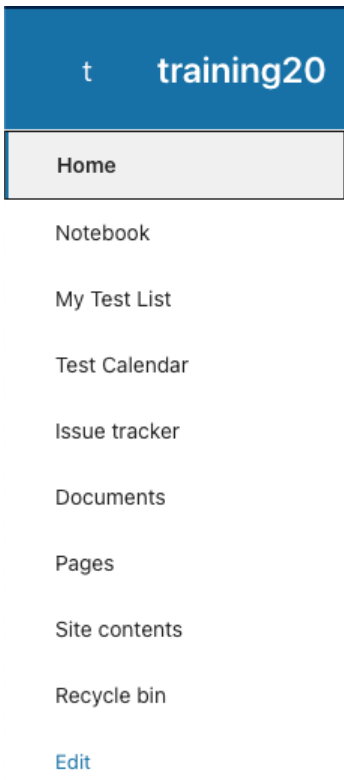


Figure 29 - The "Quick Launch" menu in your site

From the document library, click the "New" button and select "Word Document" (or any of the other Office templates):

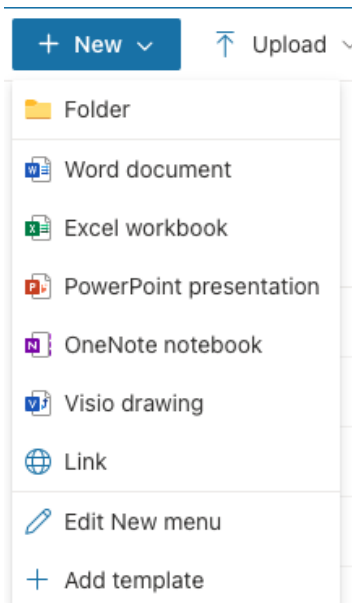


Figure 30 - Select a document type from the "New" menu

Once you've chosen, you will be taken to your new document with the edit options enabled. You can co-author with others simultaneously, and all changes will be automatically saved to your document as you edit.

Exercise 2: Create a SharePoint List in your site

Go back to your site's home page and click the "New" button to create new content, this time selecting "List":

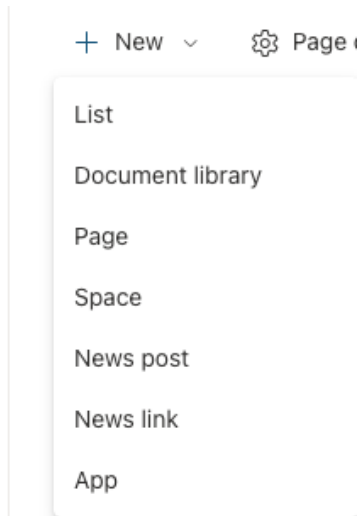


Figure 31 - The "New Item" menu, this time pick "list"

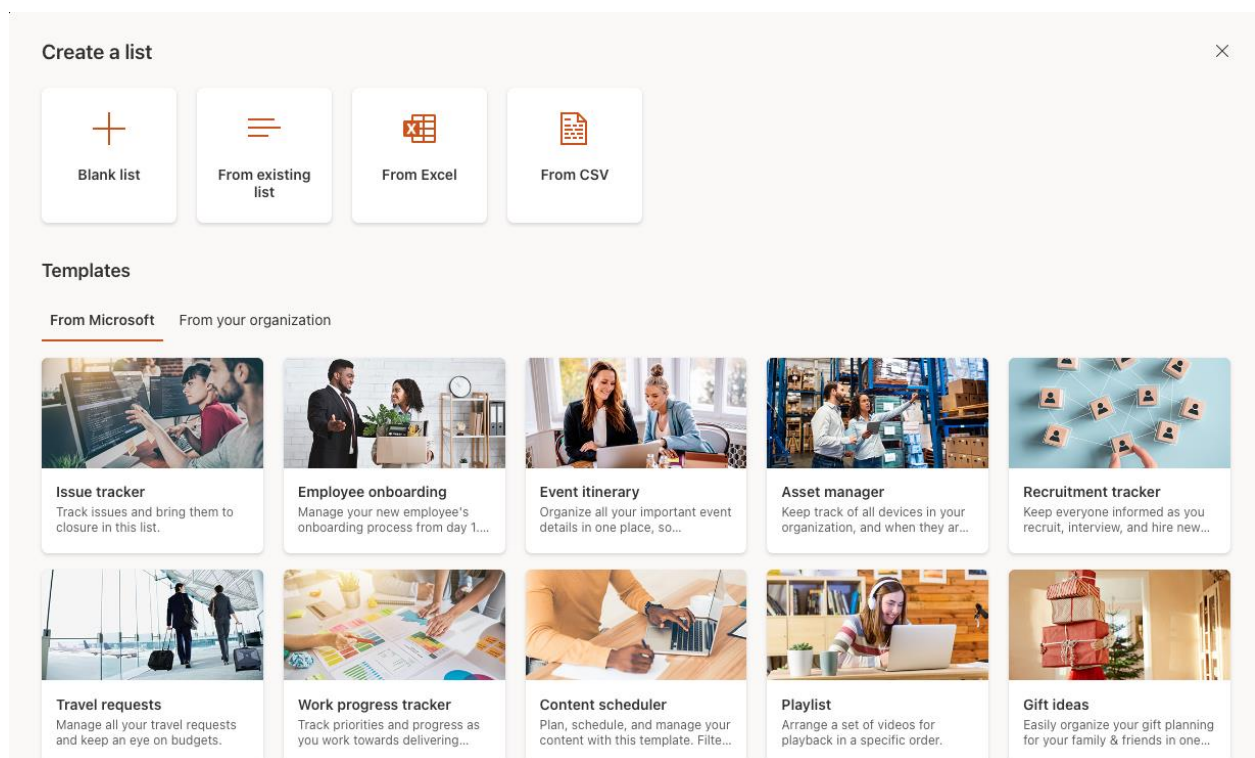


Figure 32 - The List Template picker

From here, you can start with a blank list, create a copy of an existing list (without content), create a list from an Excel spreadsheet of data, or create a list from a .CSV file. You can also pick a pre-built list template from Microsoft that will give you a head start. Let's pick "Blank List" for now.

Figure 33 - Give your list a name and a description, and choose whether you want it to show up in your site navigation

Fill in the details in the new list settings, then click the “Create” button to see your blank list.

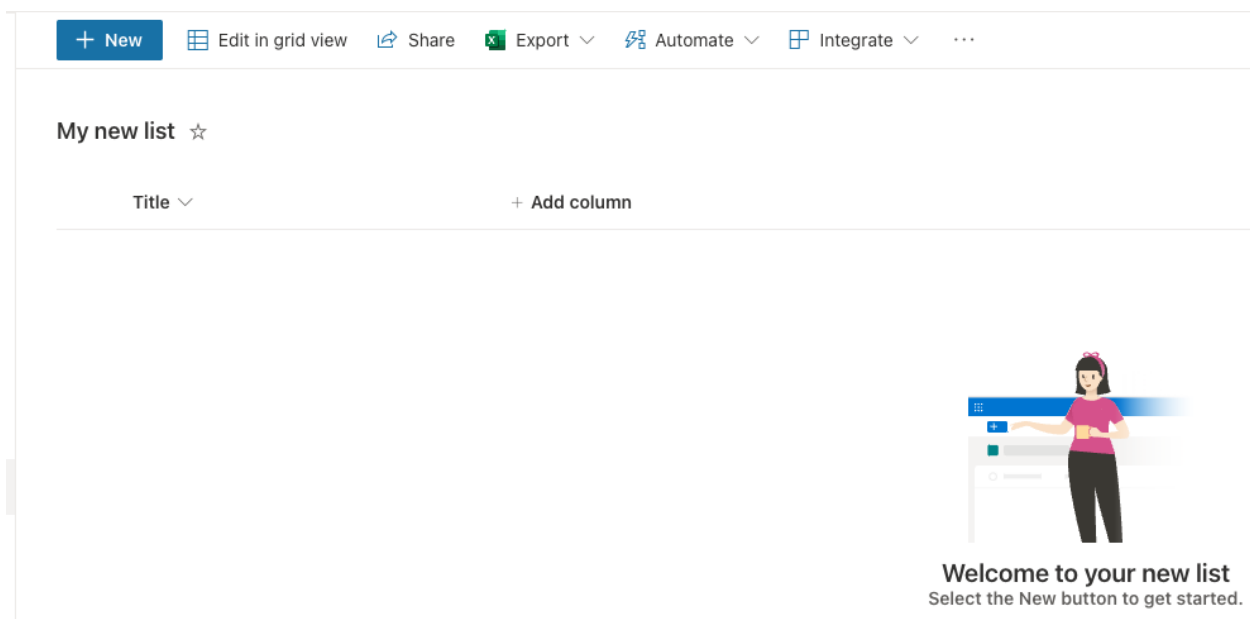


Figure 34 - A blank SharePoint list ready for duty

From here, you can add new columns to your list, change the views, export your list to Excel and of course add new rows to your list. All lists will be created with a “Title” column by default but you can rename that column to suit your use case.

There are lots and lots of options for lists – use the LinkedIn Learning training to find out more about SharePoint lists (and their ‘personal’ counterpart, Microsoft Lists (which are created in your OneDrive).

Exercise 3: Sharing and Searching and how they work with your content

Sharing

Once a document is created, it can be shared. Refer back to Section 2 – Exercise 3 for more on how to share your newly created items individually or view the LinkedIn Learning tutorials on sharing items in your SharePoint site.

Items can be shared as soon as they're created, or collaborated on in situ with co-authoring in SharePoint.

Searches

All content in SharePoint is “Crawled” by our organisation’s Search Crawl service. Newly created items in SharePoint can take around 10 minutes before they’re crawled, indexed and will feature in searches in your site.

You can do lots of things to ensure your items are crawled and indexed properly, and will feature in your searches.

See the LinkedIn Learning tutorials on SharePoint searches.

Exercise 4: Other types of site content

SharePoint can host lots of different content types. You can add your own documents to a site, or create documents in your desktop versions of Office apps, and add them to libraries.

SharePoint can also:

- Allow you to build image galleries that your users can scroll through using carousel views or gallery views
- Allow you to host videos in your site and play them in situ, or build playlists to share with your users
- Embed images and videos in your modern pages
- Build virtual reality “Spaces” in your sites
- Download documents as PDF files then re-upload them to your libraries to offer an alternative to Word, Excel, PowerPoint or Visio documents.
- Host lots of different ‘allowed’ content types. You can find a list of supported file types in the “Service Limits” page here: [SharePoint limits - Service Descriptions | Microsoft Learn](#)

Section 5: SharePoint – Where next?

Exercise 1: Applying a site template to your site

Navigate back to your site's Home Page as you have done before

Click the “Cog” menu then select “Apply a site template”

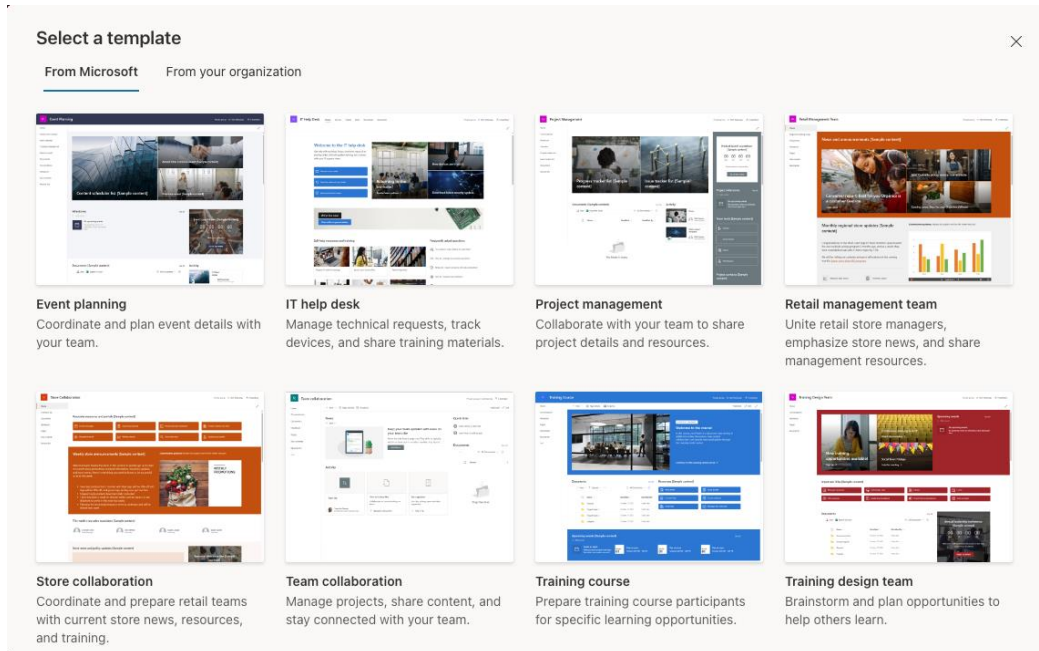


Figure 35 - The list of Team Site templates you can apply to your site (Communications Sites have a slightly different selection)

Click on one of the templates to apply it to your site. Note: The “Standard” template for a Team Site is “Team Collaboration”

Once you've picked one, click “Use Template” to add it to your site.

NOTE! Doing this will radically alter your site's home page, adding in new web parts and removing any existing ones so it's a good idea to **ONLY** do this when you've taken delivery of a fresh site. Don't worry though, the site will not delete any content when it does this so all your content will still be left intact even when you apply a new template to a well-established site.

Exercise 2: Changing your site theme

Navigate back to your home page and click on the cog menu. Click on “Change the Look” to view the theming options for your site:

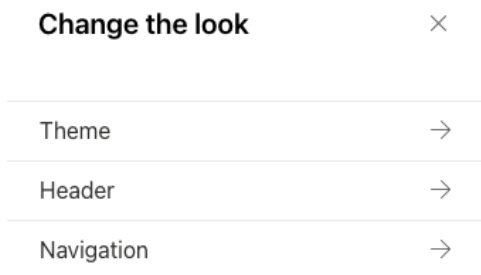


Figure 36 - The theming options for your site

Let's start with the theme itself. Click the “Theme” link to view the available colourschemes:



Figure 37 - The standard colourschemes for SharePoint Online sites

You'll see the current colourscheme used, but you can click on any of the others to apply them directly to your site. Click “Save” to make the change and you'll go back to the Cog Menu.

This time, click “Change the Look” and select “Header”

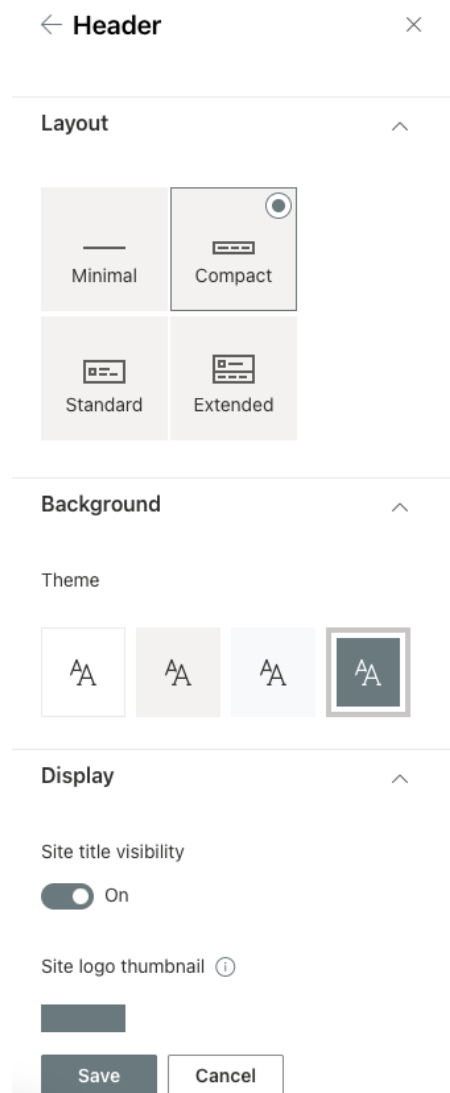


Figure 38 - The Theme Header option menu

This time you can change the header (the large title area) on your home page), make it bigger or smaller or extended, change the background format or add and remove the site title and thumbnail. Once you’ve finished editing, click “Save” and you’ll go back to the cog menu.

Last but not least, click “Change the Look” and click on the “Navigation” option menu:

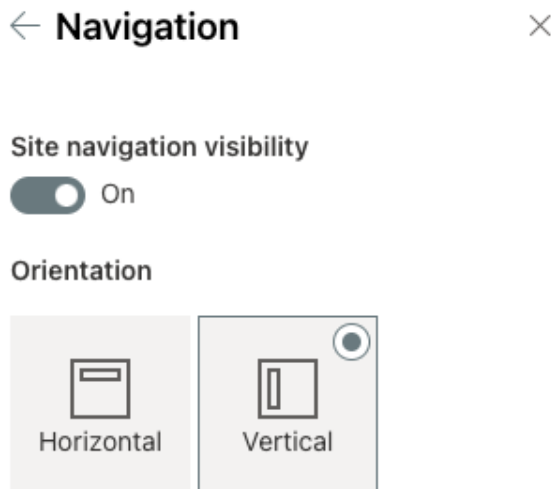


Figure 39 - The Theme Navigation Options Menu

Here, you can choose between a Horizontal menu across the top of your site, or a vertical “Quick Launch” menu (Team sites come with this one by default, Communications Sites get the Horizontal menu by default but you can chop and change between them in both site types).

Once done, click “Save” to return back to the cog menu.

Exercise 3: Accessing Help and Support options

SharePoint Online in Nexus365 is maintained in its default state, something you'll hear referred to as "Out of the Box SharePoint". As the Nexus Team is a very small team looking after a very large service, we try to keep SharePoint as close to default settings as possible with no customisation or third party integration.

This means you have an excellent chance of finding help and support outside our own documentation, but we thoroughly recommend the following sources.

- 1) The "?" Help Menu (in every SharePoint site) which you will have gone through in class.
- 2) The SharePoint Home Site in Nexus365: <https://unioxfordnexus.sharepoint.com>
- 3) The SharePoint help resources on help.it: <https://help.it.ox.ac.uk/sharepoint>
- 4) LinkedIn Learning resources for SharePoint Online: [SharePoint Online: Online Courses, Training and Tutorials on LinkedIn Learning](#) (Sign in with your SSO in LinkedIn Learning to view the link)
- 5) The Nexus User Group. This is a vibrant community of users from across the University with a good mix of technical and non-technical members. You can join the team via this link:
<https://teams.microsoft.com/l/team/19%3a6894d068ae9c4dc48c9b6532daeb43f9%40thread.skype/conversations?groupId=523de3c8-ee23-4f34-abba-1ac1902a0fa5&tenantId=cc95de1b-97f5-4f93-b4ba-fe68b852cf91>

And you can view the dedicated SharePoint Online channel once you've joined using this link:

<https://teams.microsoft.com/l/channel/19%3ab1c3b1cb7e014f06ad2e63bfe9b829af%40thread.skype/SharePoint%2520Online%2520User%2520Group?groupId=523de3c8-ee23-4f34-abba-1ac1902a0fa5&tenantId=cc95de1b-97f5-4f93-b4ba-fe68b852cf91>

In addition, it's always worth familiarising yourself with who your key contacts are for SharePoint in your own units. To view the list of Business Owners and SharePoint Network Administrators (the governance and technical leads for SharePoint use) visit

<https://unioxfordnexus.sharepoint.com/SitePages/Onboarded-Entities-Public-List.aspx> or the unit-specific lists at <https://unioxfordnexus.sharepoint.com/SitePages/Onboarded-Units---Dedicated-List-Pages.aspx>

Exercise 4: University Use Cases



Figure 40 - Some use cases the University uses SharePoint for

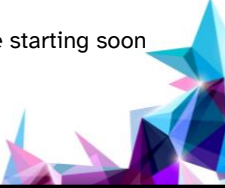
SharePoint's diversity and multi-role collaboration and sharing features make it ideal for a wide range of use cases. In class we had a discussion exercise about this, but if you want to find out more, use the Nexus User Group / SharePoint channel links in the previous page to join and engage with the user community – and remember, there's no such thing as a "Stupid question" in the NUG.

IT Centre Learning **iT** services

Welcome to the IT Learning Centre

You are in the right place ...

We'll be starting soon



IT Centre Learning **iT** services

Getting started with SharePoint Online


Phil May, Senior Systems Administrator
Dmytro Vasyutin, Senior Systems Administrator
Kenny MacIennan, Senior Systems Administrator



Ready To Learn?

Today's session takes place in class. PowerPoint will be used for pointers but exercises will be detailed in your quickstart workbooks

(Please) don't plan to multi-task!



Today's resources

How will you display your coursebook?
Where are your course files?
Which Training Site have you been allocated?
Did you bring your method of 2nd factor authentication with you?
(You will need it!)

Resources for your learning

Activities for you to practice today
In the coursebook
Work at your own pace!
Be selective



Videos with today's topics in



Follow-up work
Continue with exercises after the session
You will retain access to your training site for 5 working days after the course (after which time it will be deleted / recycled)

Your safety and comfort are important


Where is the fire exit?
Please tell us if anything doesn't work
The welcome area has vending machines and a water cooler
The toilets are along the corridor outside the teaching rooms




Your Training Site will be in the format:

<https://unioxfordnexus.sharepoint.com/sites/trainingxx>

Open your browser and navigate to it now, logging in with your single sign-on credentials (have your 2nd factor authentication method handy!)

IT Centre Learning 

Section 1: Getting Started



Exercise 1: Log in to your SharePoint site for the first time

- Navigate to your site now
- Log in using your 2nd Factor authentication method
- Stick a hand in the air if you have any difficulties
- Once in, you'll see your site's home page



Exercise 2: Time to navigate!

- Use the Quick Launch menu
- Use the links on the home page
- Use the "Cog" (site settings) menu
- Use the "Site Contents" option
- Click your site's icon for a 'short cut' back to your home page



Exercise 3: Key components of your site

- Use navigation to find your "My Documents" library
- Use navigation to view your site settings
- Find the site's recycle bin
- See what other site components you get in a standard "Team" SharePoint Site



Exercise 4: Using the search options in your site

- Use the Site Search from the home page
- Use the Library Search in your document library
- Don't be disappointed by a lack of results, we'll come back to searches later



Section 2: Sharing and Permissions



Exercise 1: Sharing your site

You will need a class partner for this (stick your hand in the air if you can't find one - Don't be shy!)

- Navigate back to your home page
- Click on the "Cog Menu" and then "Site Permissions"
- Click the "Share Site" button
- Follow your instructor's directions to complete sharing



Exercise 2: SharePoint Site Groups

- Navigate back to your home page
- Click on the "Cog Menu" and then "Site Permissions"
- Click the "Advanced Permissions Settings" link
- Click on each of the three SharePoint Site Groups to see who's in there!



Exercise 3: Permissions Micromanagement



- Navigate back to your home page
- Click on the “My Documents” link or navigate your way to your document library
- Create a quick test document
- Once done, click on the context menu next to your document to see the sharing options. Your instructor will tell you what these all mean!

Exercise 4: Permissions 101: Dos and Don'ts



- Always keep things simple
- Consider that every time you share, you create a new 'node' to manage permissions on
- Avoid sharing individual items, always consider sharing at the site or library / list level
- Use the “Top Down” approach of ensuring users can navigate your site freely, “Locking away” only items that NEED to be secure.

Section 3: SharePoint “Modern” pages



Exercise 1: Your site's home page

- Your home page is a "Modern" SharePoint page and can be edited or changed to suit your use case
- Click the "Edit" button on your home page
- Your home page is now in edit mode, take a look at some of the editing controls that can change the way your page looks
- When you've finished exploring, click the "Republish" button to commit your changes



Exercise 2: Create a new "Modern" page

- Navigate back to your site's Home page if you're not already there
- Click the "New" button and select "Page"
- Choose an option from the templates available
- Have a go at creating a brand new page. Start by giving it a title, make some changes, click some controls, add some text or images, and then "Save" your page.



Exercise 3: Web parts for "Modern" SharePoint pages

- Navigate to your newly created page
- Click the "Edit" button
- Click the "Plus" buttons in a page section to select a new Web Part
- Have a play with the different web part options. Some web parts are supported, some aren't so learn which ones work best for your use case



Exercise 4: Adding news pages to your site



- Navigate back to your home page
- Click the “New” button and select “News Post”
- Select one of the templates available
- Create your news page, have a play with the different modern page options for news posts.
- Once done, publish your news post.

Section 4: Content creation



Exercise 1: Create a document in your site



- Navigate back to your home page
- Click on the “Documents” link in your quick launch menu
- Once in your document library, click the “New” button and select one of the MS Office templates you see (Word, Excel, PowerPoint, OneNote Notebook or Visio Drawing)
- Add some sample content to your document. Once done, click the “File” menu then “Close”

Exercise 2: Create a SharePoint List in your site

- Navigate back to your home page
- Click on the “New” button then select “List”
- Lists have LOTS of templates and options. You can pick a pre-built template, or create a list from ‘blank’ – how adventurous do you feel?
- Once done you’ll be taken back to your list
- Add some test entries and see what happens!

Exercise 3: Back to sharing and searching and how they work with your content – You’ll need a new partner for this

- Try a search in your document library. Navigate there and use the ‘search this library’ option
- Do the same for your list
- Find a new partner and share a document with that user
- Share a list item with them in a similar way
- “Context” menus are super powerful!

Exercise 4: Other types of site content

- SharePoint handles images and video content
- SharePoint also handles PDF files (It can’t create them on the fly or convert existing documents but here’s a useful trick!)
- SharePoint allows you to embed Microsoft Forms into your site for surveys, questionnaires etc.
- SharePoint also allows you to embed other sites and content via the ‘embed’ web part

Section 5: SharePoint – Where next?



Exercise 1: Applying site templates to your site

- Navigate back to your home page
- Click on the “Cog” menu
- Select the “Apply a site template” option
- Select one of the available site templates – doesn’t matter which one
- Click “Use Template”
- Now go back to your home page to see the result.



Exercise 2: Changing your site theme

- Navigate back to your home page
- Click on the “Cog” menu
- Select the “Change the Look” option
- Use the available options to change the theme colourscheme, the “Header” options (the title area for your home page) and the navigation options
- See the effect on your home page



Exercise 3: Accessing help and support

- Navigate back to your home page
- Click on the “?” next to your profile pic
- Have a look at some of the tutorials, support articles and options under the site menu
- Visit <https://unioxfordnexus.sharepoint.com> for more help
- Visit <https://help.it.ox.ac.uk/sharepoint> for even more help



Exercise 4: University use cases, and your own – Discussion Zone

- Talk about the use of SharePoint in your own units. Stick a hand in the air, don't be shy
- Can you think of a use case that you'd find for SharePoint Online?
- What other aspect of SharePoint would you like to see covered in future courses?

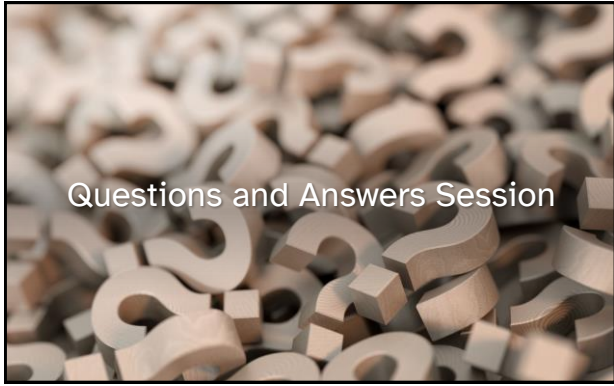


Find the resources for this workshop in our IT Learning Portfolio

Download the files (and more) from the IT Learning Portfolio at

skills.it.ox.ac.uk/it-learning-portfolio





IT Centre Learning 

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