Getting Started with SharePoint Online

Worksheets and "How to" details

iT Centre Learning

iT services

UNIVERSITY OF OXFORD

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 updated	By	Comments
2.0	April 2024	Phil May	None
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 W2C7BE7 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/7122497710808555521?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

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:
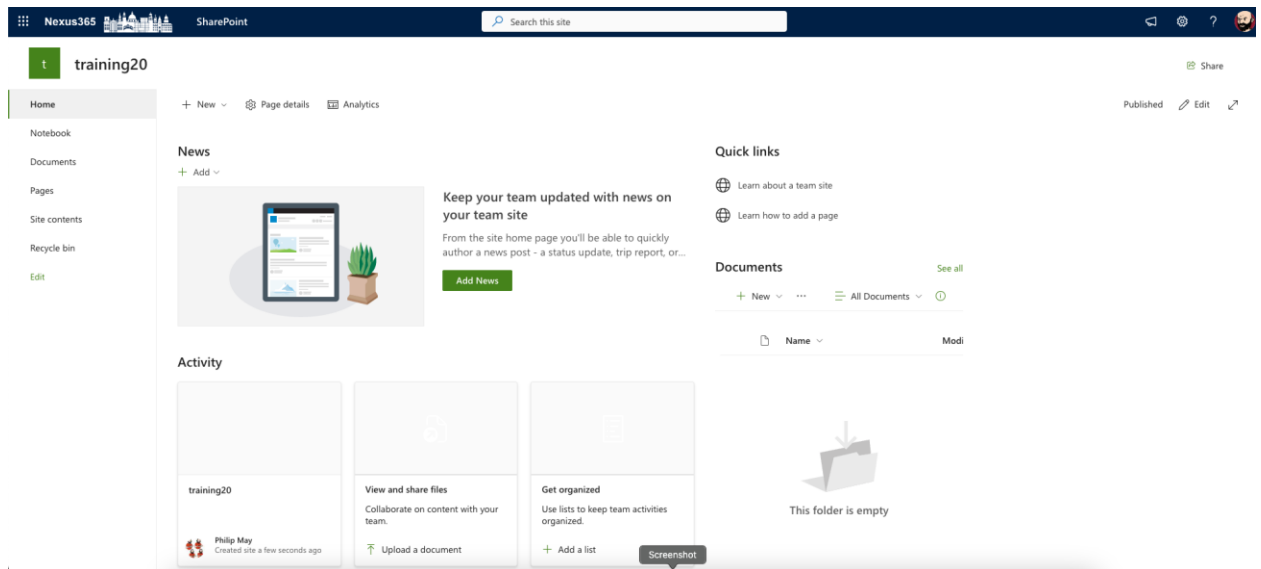
Figure 1 - Your Sharepoint Team Site Home Page

Navigation options – how to get around your site.

The Team Site Home Page
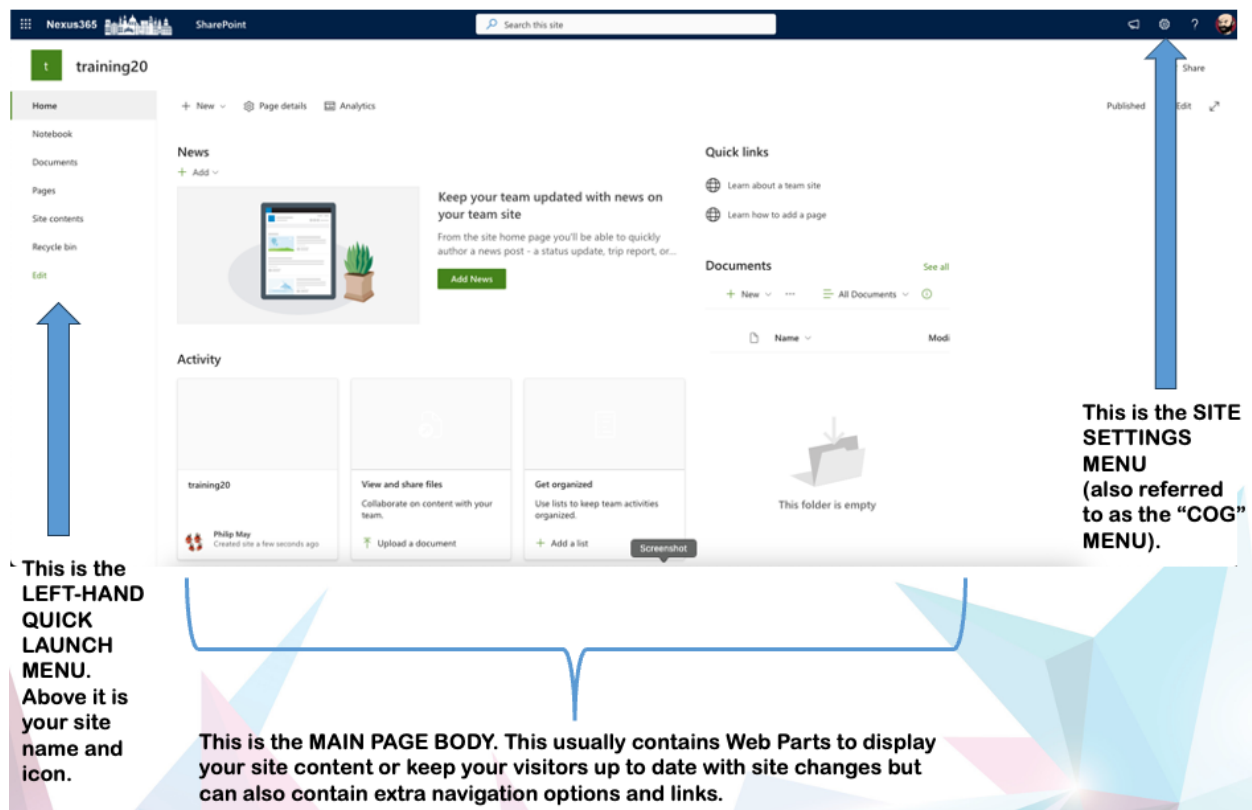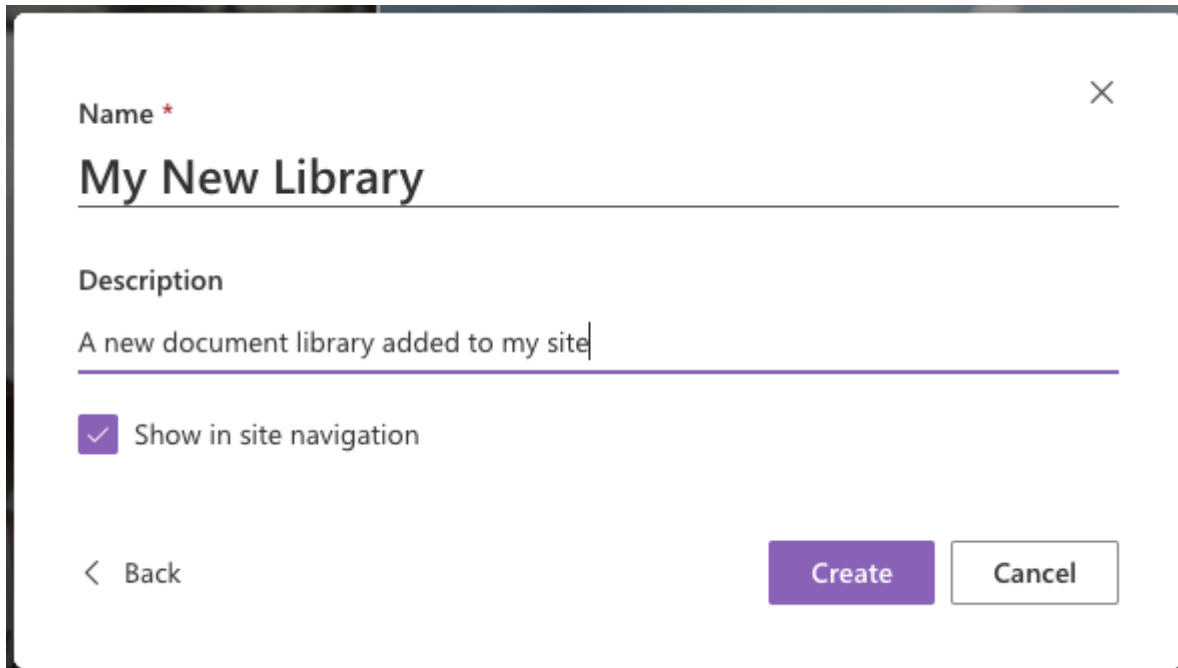
Figure 2 - Site navigation options in a SharePoint Team site

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).

Section 2: Libraries and Lists

Creating a Document Library

From the "New" button, select "Document Library", choose a template (or just use "Blank" for the default library type) and then give your library a name and a description. Choose whether to show the library in your site navigation then click "Create" to finish off the creation process:
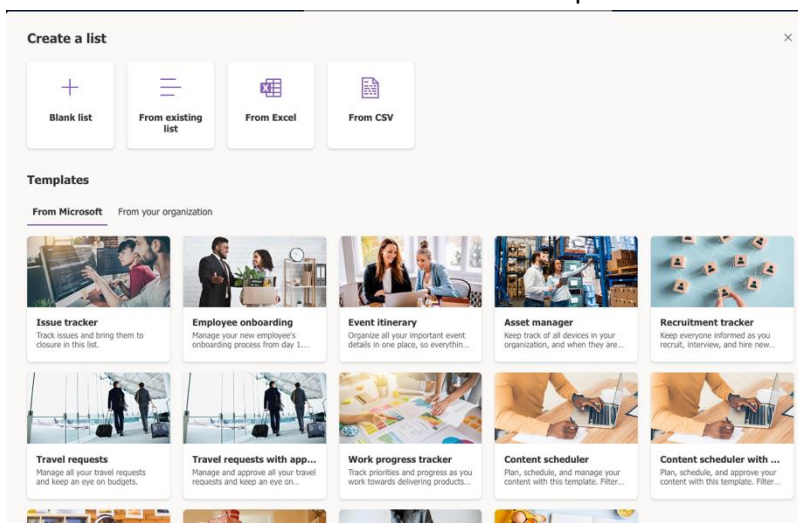
Figure 3 - Creating a new document library

Creating a list

From the "New" button in your home page, select "List", choose a template and then give your list a name and a description. Choose whether to show the library in your site navigation then click "Create" to finish off the creation process:

Figure 4 - Create a new SharePoint List

Figure 5 – Give your list a name and a description and choose navigation options

Section 3: Sharing and Permissions

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"
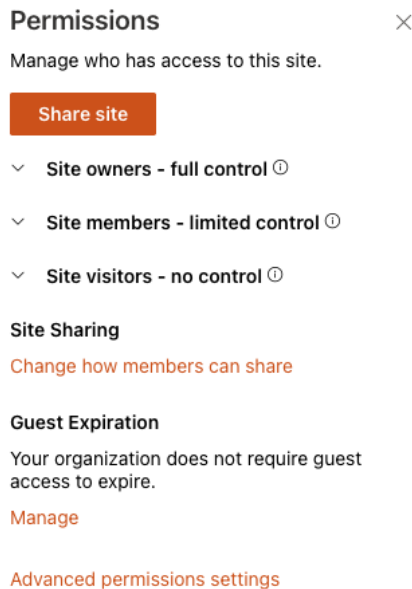
Look for the "Share Site" button:

Figure 6 - The "Share Site" button under the Site Settings > Site Permissions menu
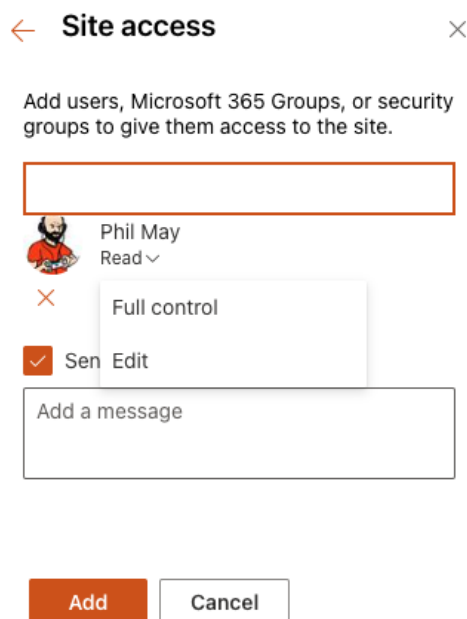
Click the "Share Site" button for the sharing menu:

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.

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:
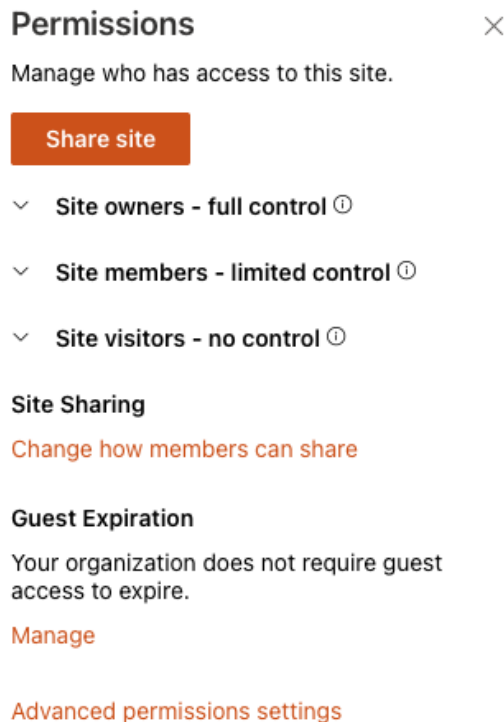

Figure 8 - The Permissions > Advanced Permissions Settings menu
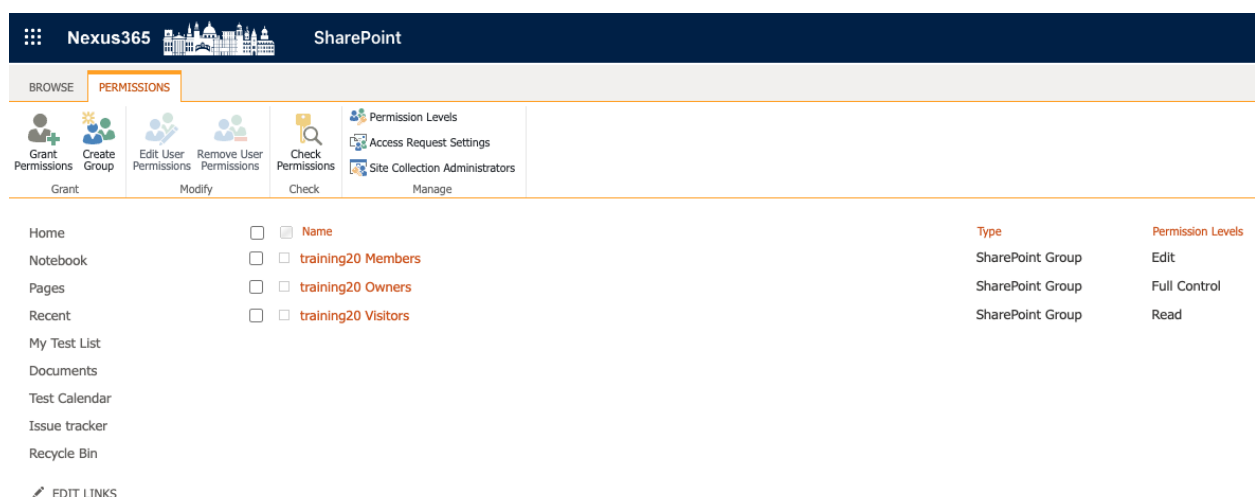
You will then see all your site groups:

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

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):
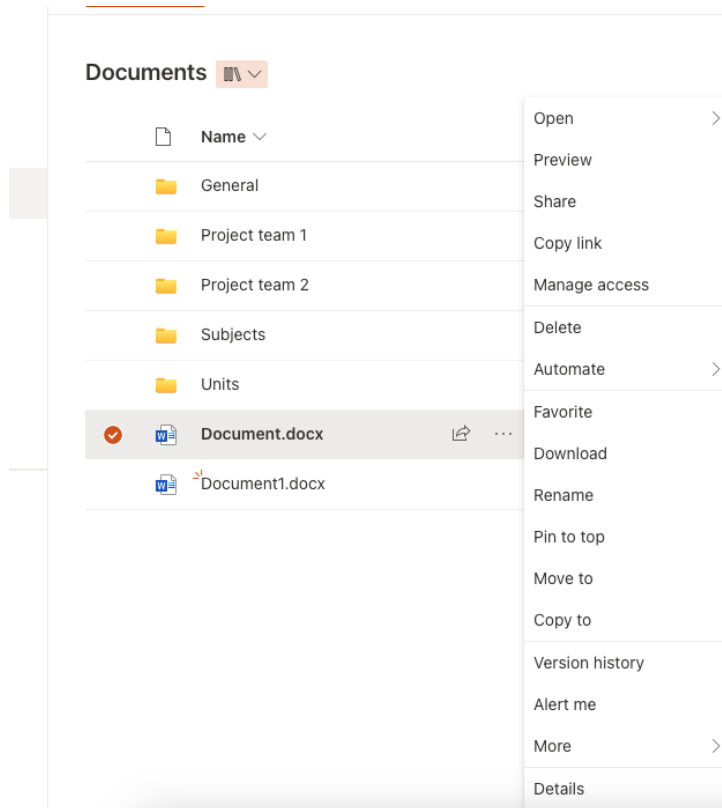

Figure 10 - The context menu next to a document in a library

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.
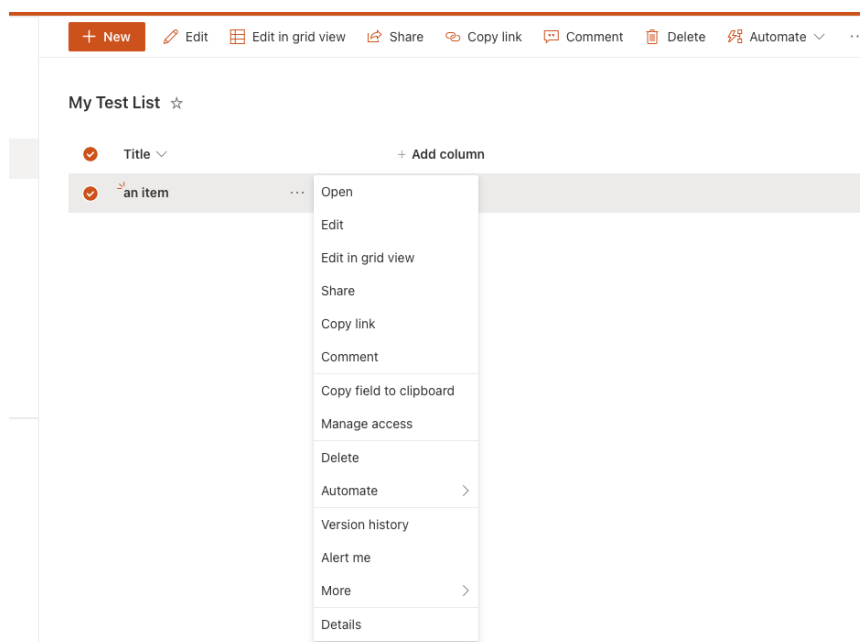
Context menus can also be found in lists:

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).
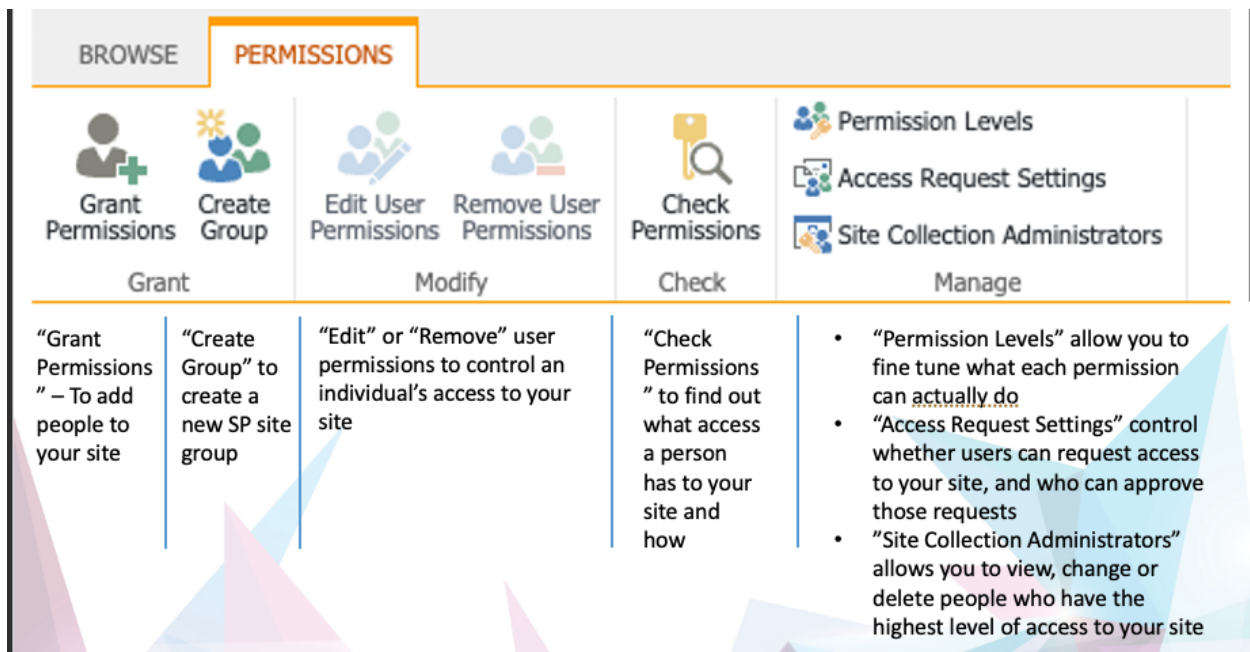

Figure 12 - The Permissions Ribbon in detail

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.

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 4: SharePoint "Modern" Pages

Your site's home page

Navigate back to your site's home page and click the "Edit" button in the top right hand corner:
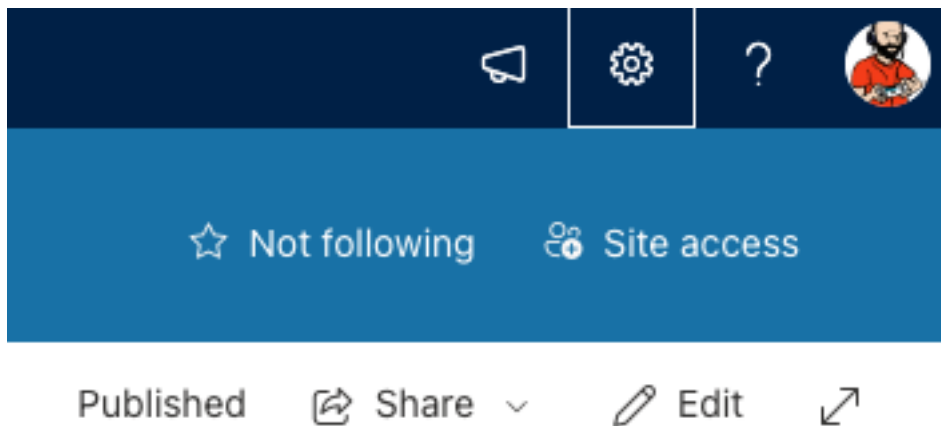

Figure 13: The "edit" link in the top right of your home page

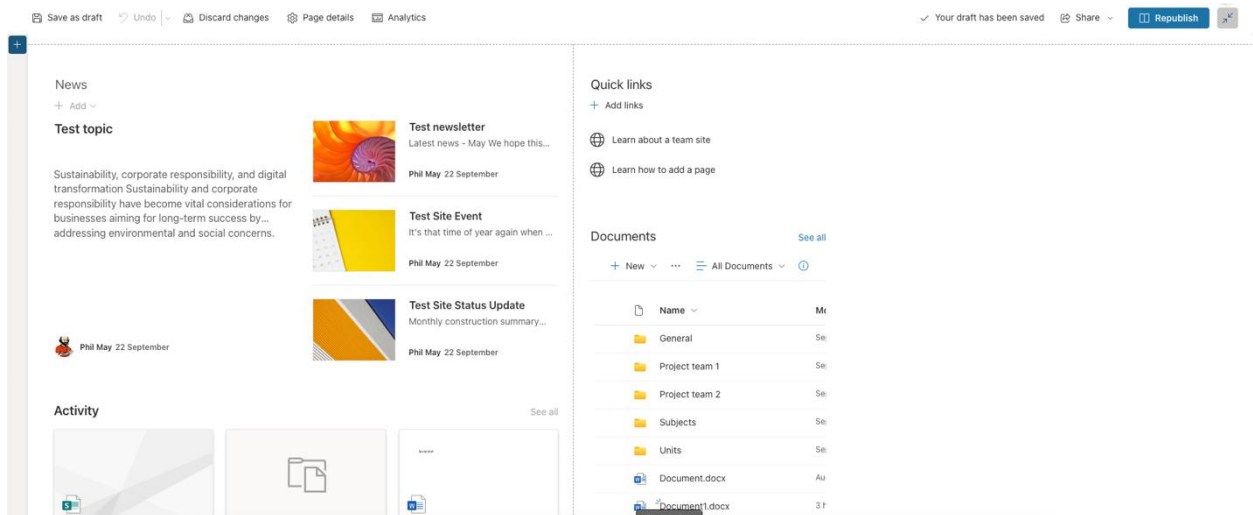Your site will be put into "Edit" mode like so:

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

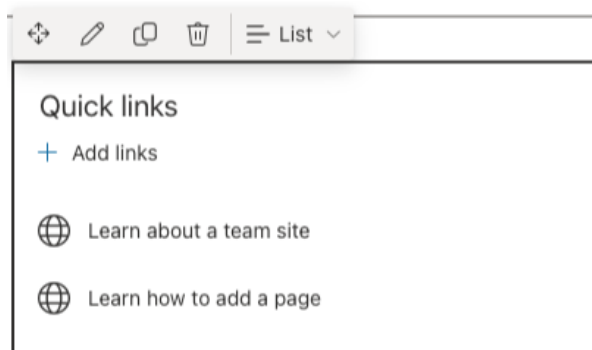As you roll your mouse over the page, web parts (the content containers in the centre of your site's home page) will be highlighted. Clicking on them will show their edit controls:

Figure 15 - A Web part's edit controls

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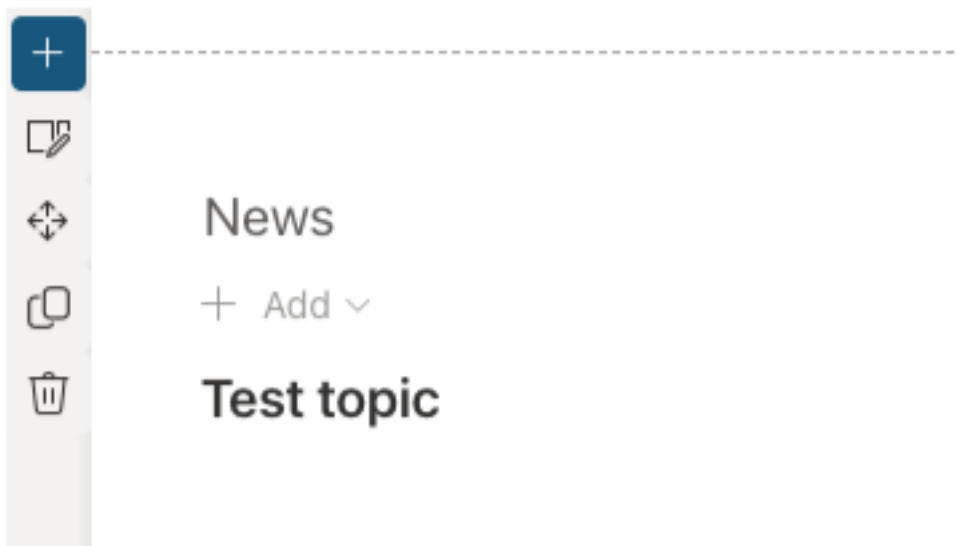

Figure 16 - Section controls in a modern page

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:
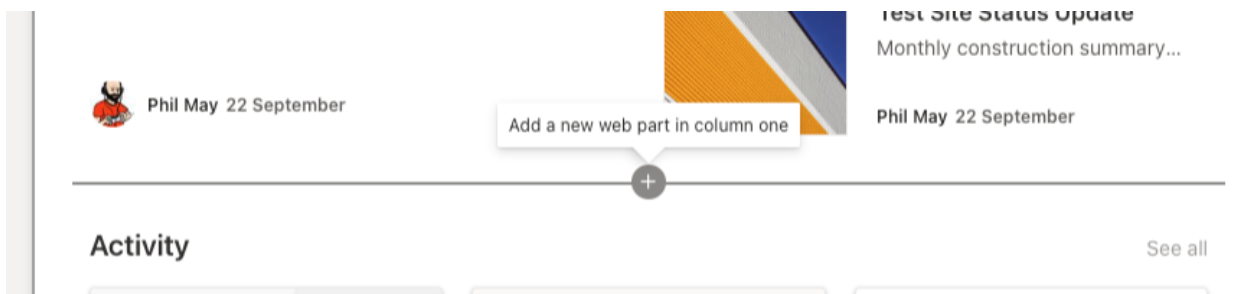

Figure 17 - The "add a new web part in column one" control

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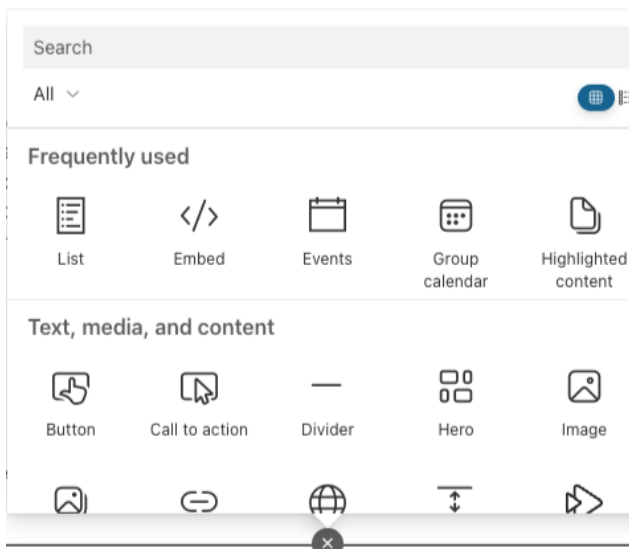

Figure 18- Adding a new web part from the web parts menu

Creating a new "Modern" page in your site

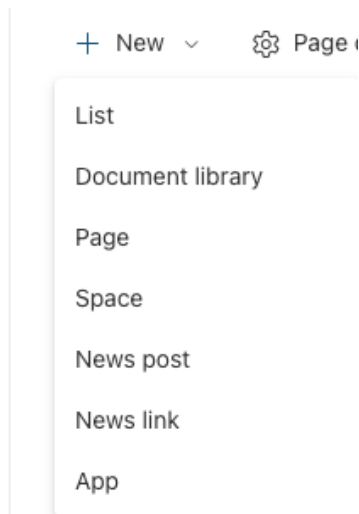Navigate back to your home page and click the "New" button, then select "Page":

+ New ∨   ⚙ Page

List

Document library

Page

Space

News post

News link

App

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.
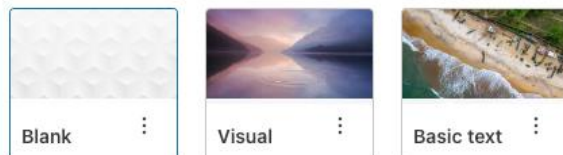
Blank   Visual   Basic text

Figure 6 - 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:
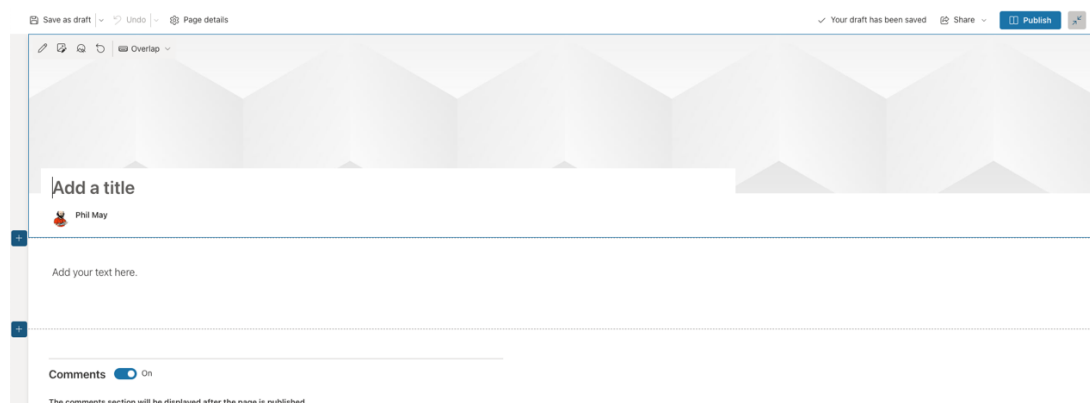

Figure 21 - Your new page is created, and shown in "edit" mode. Make changes then click "Publish" to make your page available to your site users

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:
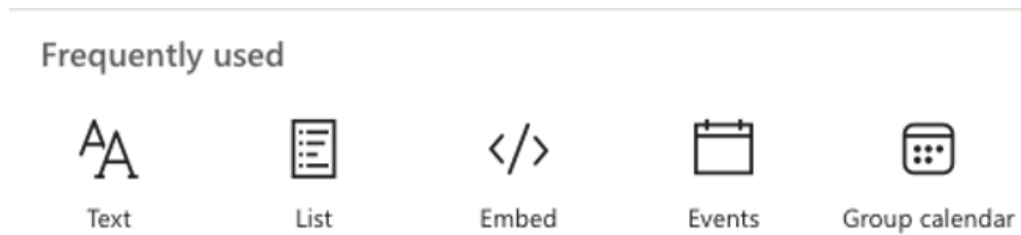
- Text – We've already met. Add text to your site
- List – Show a list from your site in a web part view
- Embed some code snippets or content into your site
- Show the events calendar from your site
- Add a summary of an O365 Group Calendar to your site

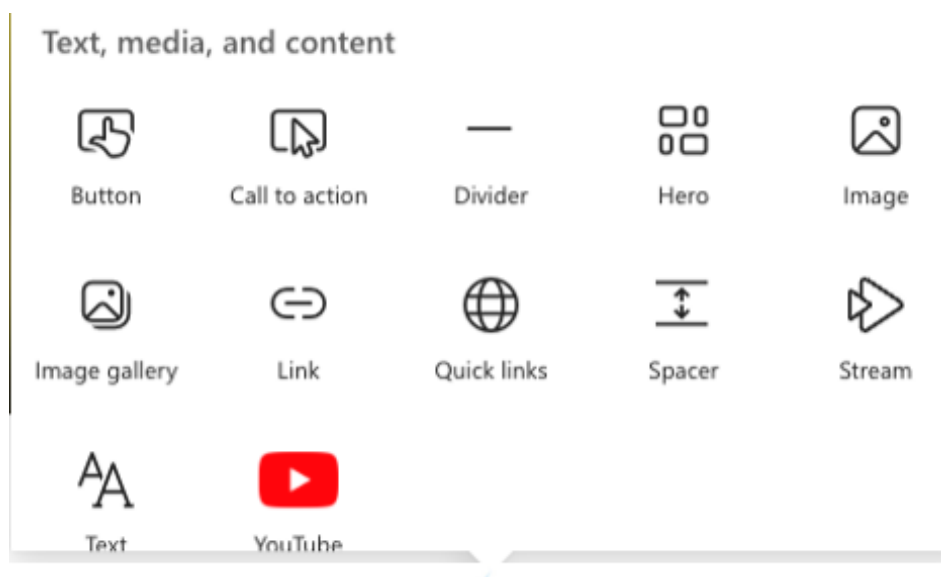Figure 22 - The most frequently used web parts

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
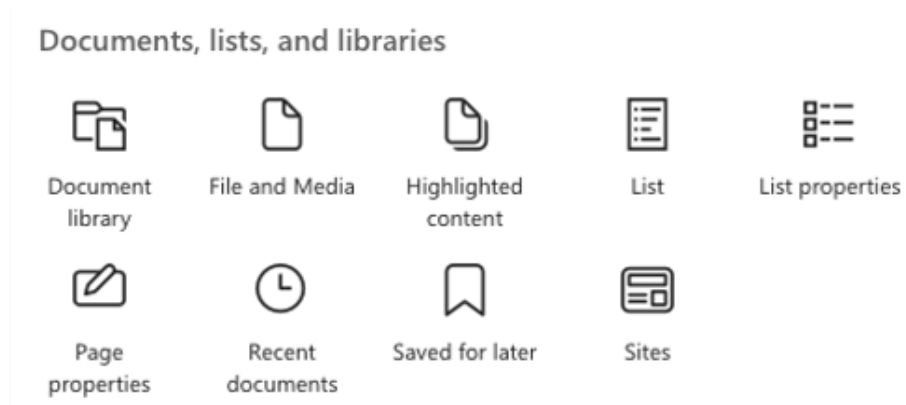
- YouTube – Insert a YouTube video in your page

Figure 7 - 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.

Section 5: SharePoint – Where next?
Applying a site template to your site

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

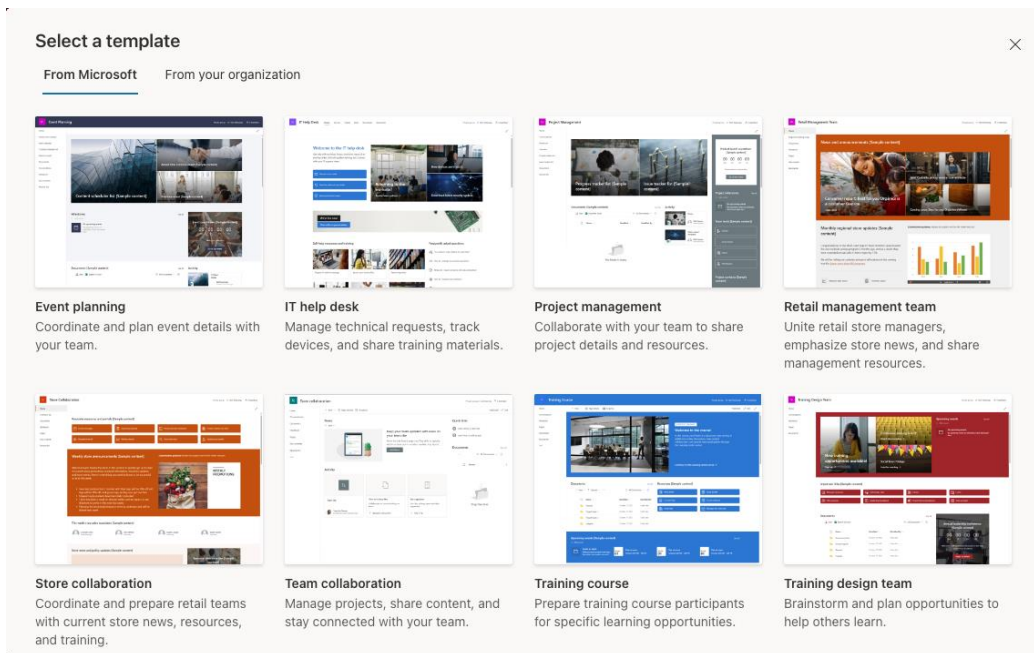Click the "Cog" menu then select "Apply a site template"

Figure 27 - 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.

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:
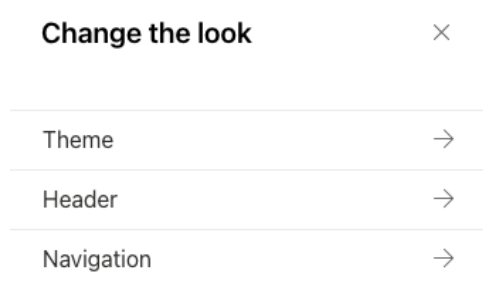

Figure 28 - The theming options for your site

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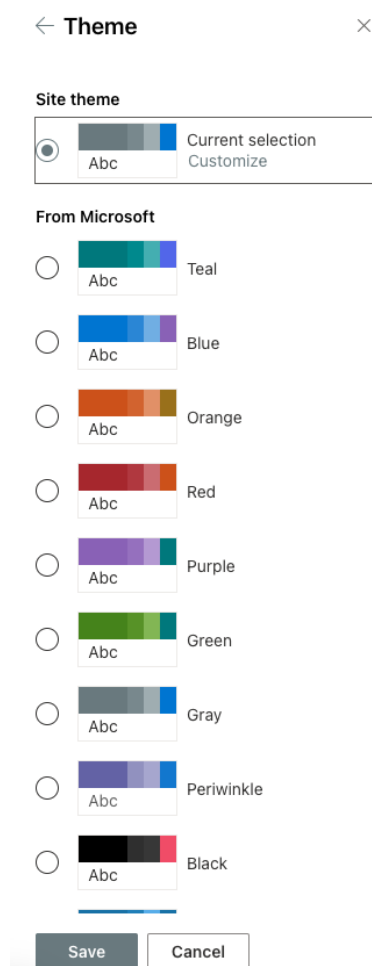

Figure 29 - The standard colourschemes for SharePoint Online sites

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 30 - 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:
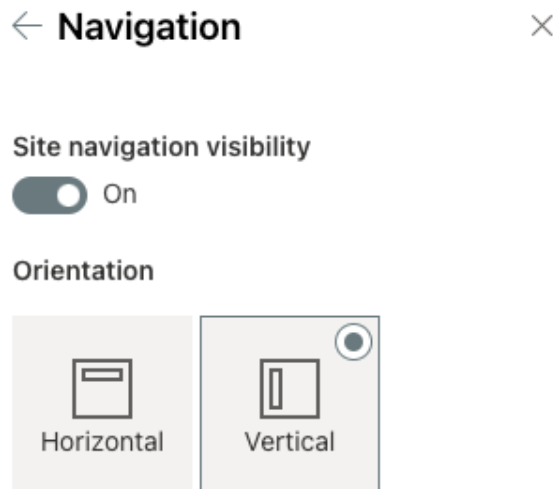

Figure 31 - The Theme Navigation Options Menu

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.

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

Discussion Zone: University Use Cases

Figure 32 - 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 mode, 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.

Once again, the NUG joining details:
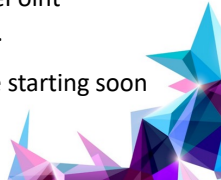
Join with the code W2C7BE7

Or use the link Nexus 365 User Group | General | Microsoft Teams

Welcome to the IT Learning Centre

Up and Running with SharePoint
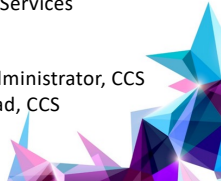You are in the right place …

We'll be starting soon

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Up and Running with SharePoint Online

Trainer: Phil May, Senior Systems Administrator,
Communications and Collaboration Services

Colleagues:
Dmytro Vasyutin, Senior Systems Administrator, CCS
Kenny Maclennan, Deputy Team Lead, CCS

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Ready To Learn?

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

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

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Today's resources

Use your coursebook for guidance or ask questions / stick your hand in the air for help

Which Training Site have you been allocated? You will have been emailed about this prior to the course

Did you bring your login credentials and method of 2nd factor authentication with you?

(Please say yes! You will need them!)

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Resources for your learning

Activities for you to practice today
In the coursebook
Work at your own pace but don't panic, you do not have to complete everything in class time

Videos with today's topics in **Linked** in Learning

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)
Don't panic if you can't complete an exercise, you will be able to work through your workbook at your own pace after the training

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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

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Your Training Site will be in the format:

https://unioxfordnexus.sharepoint.com/sites/training**
(where ** is the number you have been given)

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

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Section 1: Getting Started

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Which site is yours?

- Adelina – https://unioxfordnexus.sharepoint.com/sites/training01
- Louise - https://unioxfordnexus.sharepoint.com/sites/training02
- Karen - https://unioxfordnexus.sharepoint.com/sites/training03
- Susannah - https://unioxfordnexus.sharepoint.com/sites/training04
- Sharon - https://unioxfordnexus.sharepoint.com/sites/training05
- Gillian - https://unioxfordnexus.sharepoint.com/sites/training06
- Isabelle - https://unioxfordnexus.sharepoint.com/sites/training07
- Alison - https://unioxfordnexus.sharepoint.com/sites/training08
- Gerard - https://unioxfordnexus.sharepoint.com/sites/training09
- Rebecca - https://unioxfordnexus.sharepoint.com/sites/training10
- Carol - https://unioxfordnexus.sharepoint.com/sites/training11
- Elizabeth - https://unioxfordnexus.sharepoint.com/sites/training12

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Logging into your SharePoint site for the first time

- Navigate to your site now by typing the URL into your favourite browser or by clicking on the link in your email
- Log in using your username, password and 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

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Time to navigate!

If you've never used SharePoint before, take a moment to familiarise yourself with 'getting around' within your site

- Use the Quick Launch menu
- Use the links on the home page
- Use the "Cog" (site settings) menu (remember this one, you will use it a LOT!)
- Use the "Site Contents" option
- Find the recycle bin
- Click your site's icon for a 'short cut' back to your home page

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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

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Section 2: Libraries and Lists

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Document Libraries and Lists are the MVPs of your SharePoint Sites

- You get a document library provided with your site by default
- You can create up to 2000 document libraries in your site
- Lists aren't provided by default but they're really easy to create
- You can create up to 2000 lists in your site

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Let's create a new Document Library!

- Go back to the home page of your site
- Click on "New" then "Document Library"
- Give your new library a name and a description, and choose whether to show it in your site navigation or not
- Once done, you'll be taken back to your new library ready for use

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Document libraries inherit their permissions from your site by default

BUT you can create separate permissions for each library

This is one of the best ways to create 'private' document areas in your site

We'll cover this in more detail in the upcoming permissions section

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Let's create a new SharePoint list in our site

- Go back to the Home Page of your site, and click "New" but this time choose "List"
- Pick the template you want to use (start simple, use "Blank")
- Give your list a name, a description and choose whether to show it in the site navigation or not
- Your list is ready to use!

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Lists are created with a "Title" column by default but you don't have to stop there

01
Click the "Add Column" button in your list to create a new column

02
Choose from one of the column types, there are lots of different use cases for each type of column

03
Once you've finished adding some columns, it's time to create some items in your list!

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Like Document Libraries, lists inherit their permissions from your site by default

- BUT lists can have unique permissions too
- You can set up list-level permissions so people can access, add to and edit the whole list OR...
- You can set up a list so that people can only add, view, edit and delete their OWN entries with just a couple of clicks
- This saves a lot of work and effort when dealing with list permissions

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Section 3: Sharing and Permissions

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Let's talk about cake!

Imagine your SharePoint SITE is the whole cake. You could "Share" the whole cake with someone if you wanted to...

...or you could just share a slice (the slices being your document libraries and lists, which can be 'shared' separately)

Also (if you're like me) you could pick that slice apart and devour each bit separately! Imagine the layers of a slice of cake, or the currants, cherries, sprinkles etc as your individual files and folders. Once again those individual bits can also be shared separately. BUT the more sharing you do, the more complicated dividing up your cake gets!

Everything in SharePoint has just two permission 'states'. "Inherited" (from the Site, or the library / list, or the folder) or "Unique" (where individual items are shared...well..uniquely!)

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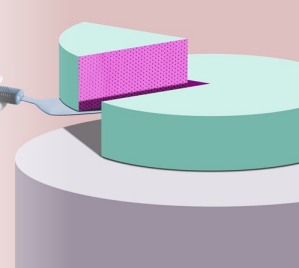
- Navigate back to your home page
- Click on the "Cog Menu" and then "Site Permissions"
- Click the "Share Site" button
- Follow your instructor's directions to complete sharing

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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!

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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!

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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.
- That said, ALWAYS consider privacy requirements. If you're unsure about visibility of items in a site, don't guess or wing it, create a site specifically for sensitive materials and limit access to that site

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Section 4: SharePoint "Modern" pages

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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

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Let's 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.

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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

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Section 5: SharePoint – Where next?

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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.

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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

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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

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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?

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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

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Q & A and Discussion Zone (if we have time!)

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Acknowledgements

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• phil.may@it.ox.ac.uk

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