

Tech Training

SharePoint: Fundamentals

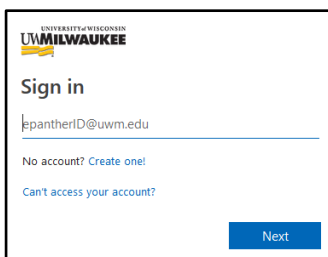
This class will introduce you to SharePoint and cover components available to users in a typical SharePoint site. To access SharePoint, you will need to log into Office 365.

Accessing and Logging In

Office 365 is available on any device with an internet connection. Office 365 works with desktop computers, laptops, tablets, and mobile devices. To access and log into Office 365 go to:

uwm.edu/office365

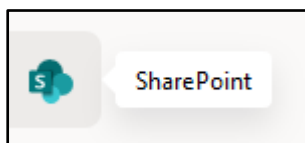
Once at the login screen, type in your UWM email address and password.



Confirm your identity via your desired Duo security method (Push/Code entry).

Office 365: SharePoint

SharePoint is the app within Office 365 that creates websites used as secure places to store, organize, share and access information. In the list of apps along the left side of your screen, click **SharePoint** to open the app.



What is SharePoint?

SharePoint allows users to create and access websites used to collaborate, communicate, organize and access information from almost any device using a browser. A SharePoint site can be as simple as a repository for documents to complex multi-page sites housing tools such as task lists, contact information and calendars. Because of the integration with Office 365, you can create and edit Microsoft Office files (such as Excel, PowerPoint and Word) within SharePoint.

Below are some guidelines to determine if SharePoint is the correct storage location for your files:

- The file is part of a collection of files related to a group project or task
- You want to share the files based on the team accessing the site, not individual users
- You want to share ownership of the file with others who can access the site

Types of SharePoint Sites

At UWM, there are two types of SharePoint sites in use: SharePoint sites created with Teams and SharePoint sites created by an Office 365 Administrator. Earlier usages of SharePoint required an Office 365 Administrator to design and configure your site; with updates to Office 365, anyone at UWM can create a SharePoint site by simply creating a Teams site; the Files section of a Team is a SharePoint site.

To create a Team (and its corresponding SharePoint site):

1. Open the **Microsoft Teams** desktop app, and in the navigation bar on the left click **Teams**.
2. In the upper right corner of the screen, click the **Join or create team button**.
3. On the next screen, hover over the **Create a team** tile and click the **Create team** button.
4. Follow the prompts on the screen to create a Team.

Once created, you can access the Files for the Team through Teams or SharePoint.

If you have the earlier type of SharePoint site (that was created by an Office 365 Administrator and does not have a corresponding Teams site), to make changes to the membership you must contact the UWM Help Desk at (414) 229-4040 or visit uwm.edu/helpdesk.

Locate, Follow and View a Site

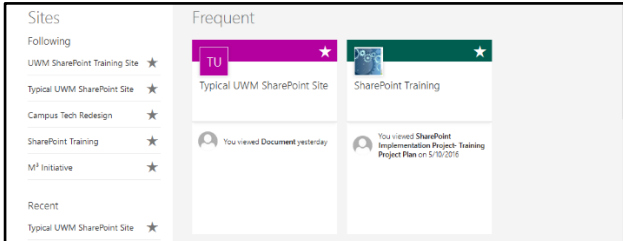
To visit a SharePoint site, the site owner must grant you permissions to access the site. Depending on the level of access to the site, you may be restricted to viewing documents on the screen or possibly be granted permissions to edit the site. In this class, you will be a **Site Member** and have **Edit** permissions to the content in the training site; you may have more or less permissions for other SharePoint sites shared to you.

SharePoint App

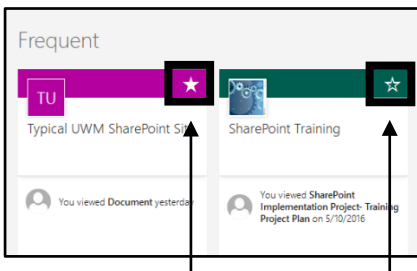
Using the SharePoint app in Office 365, you can directly access your site.

1. Click on the App Launcher in the upper left corner of the screen. From the grid of tiles, choose **SharePoint**.

- When the SharePoint app loads, you see a list of all the sites you can access. The pane on the left contains a list of the sites you are **Following** and a list of **Recent** sites you visited. The middle of the screen also shows **Frequent** sites.

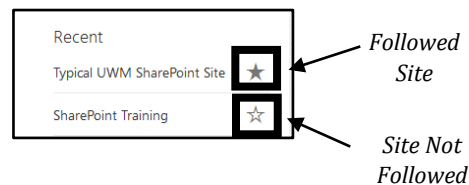


- Sites that have an empty star are sites that are shared to you that you have not yet followed. To follow a site, click inside of the star to fill it in, this will work in the **Recent** and **Frequent** sections.



Followed Site

Site Not Followed



Followed Site

Site Not Followed

- Click on the name of the site you want to visit in the **Following**, **Recent** or **Frequent** section.
- If you cannot find the site you want to visit, click in the **Search bar** at the top of the left pane and type in the name of the site.

Web Browser

Because SharePoint sites are web pages, you can type in the URL for a SharePoint site or bookmark a SharePoint site in your browser.

Type in the URL

- Open a web browser.
- Type in the URL for the SharePoint site in the **Address bar** of your browser.

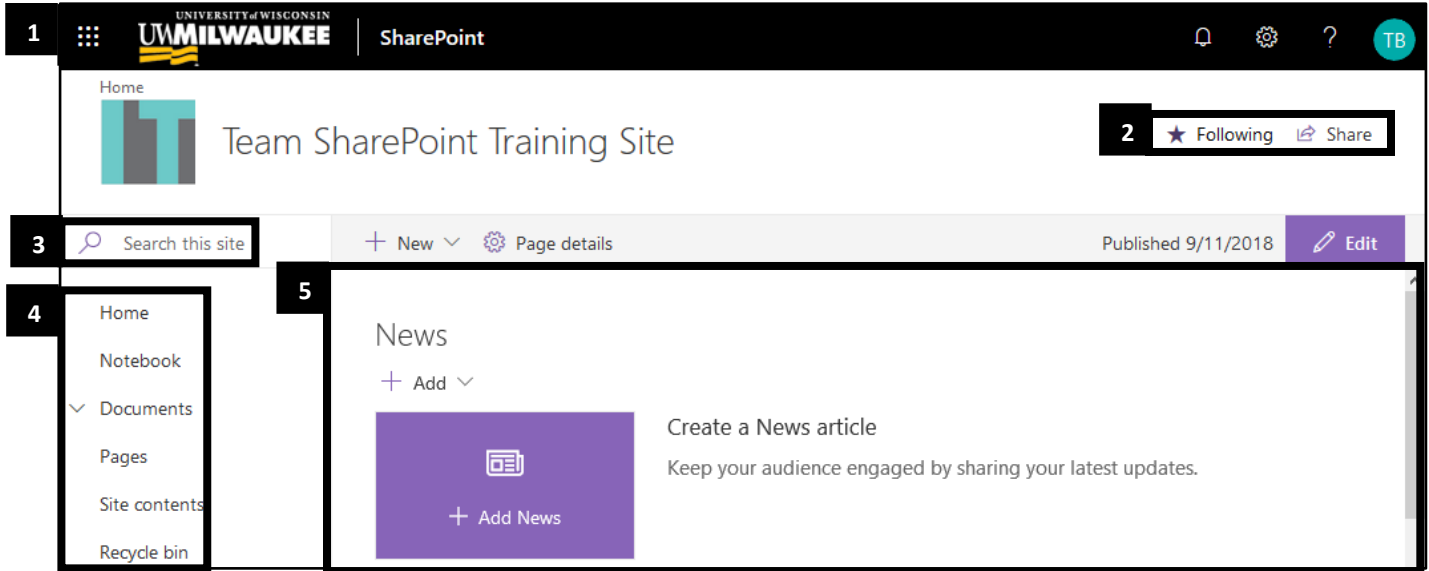
Bookmark a SharePoint Site

- In Office365, navigate to the **SharePoint** app and then locate and click on the SharePoint site you want to bookmark.
- After the site loads on the page, you can use the **Bookmark** tool in your web browser to bookmark the site.

NOTE: If you do not know how to locate or use the **Bookmark** tool in your browser, read the browser help files for instructions.

- Once the site is bookmarked, you can go to your bookmarks and click on the link for the site at any time to visit the SharePoint site. You may be prompted to log into Office 365 before you can access the site.

SharePoint Working Screen



	Section	Description
1	App Launcher	Allows you to move between the different apps in Office 365 such as Outlook and OneDrive.
2	Site Options	Contains buttons for following and sharing the site with others.
3	Search Bar	Used to search for items on the SharePoint site.
4	Navigation	Lists features of the site and provides a quick way to navigate and access the content on the site. Can be on the left of the page or on the top of the page.
5	Page Content	Shows contents of the SharePoint site including elements like the document library and News.

NOTE: Microsoft 365 is a cloud service updated and maintained by Microsoft. As a cloud service, Microsoft can update and change features in Office 365 as needed. UWM has little to no control over these changes and parts of this document may be incorrect after printing/publishing because of these updates.

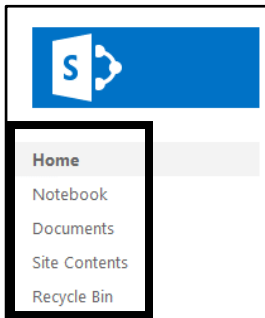
Navigating a Site

The navigation elements covered in this section are based on default SharePoint site settings. Other SharePoint sites you use may have customized navigation elements different from what you see in training.

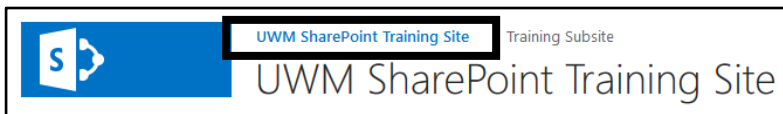
Navigation Bars

There are two main navigation components found on most SharePoint sites, the **Quick Launch** and the **Top Link Bar**.

The **Quick Launch** is located on the left side of the SharePoint site. Quick Launch is a list of links that take you to other parts of the SharePoint site or to outside links such as your departmental website.



The **Top Link Bar** is located at the top of the SharePoint screen and contains a link to the home page of the site. Your site administrator can also add links to other parts of the SharePoint site and to external web pages.



SharePoint Apps

In addition to navigational elements, a SharePoint site also can have site apps. Below are some commonly used apps.

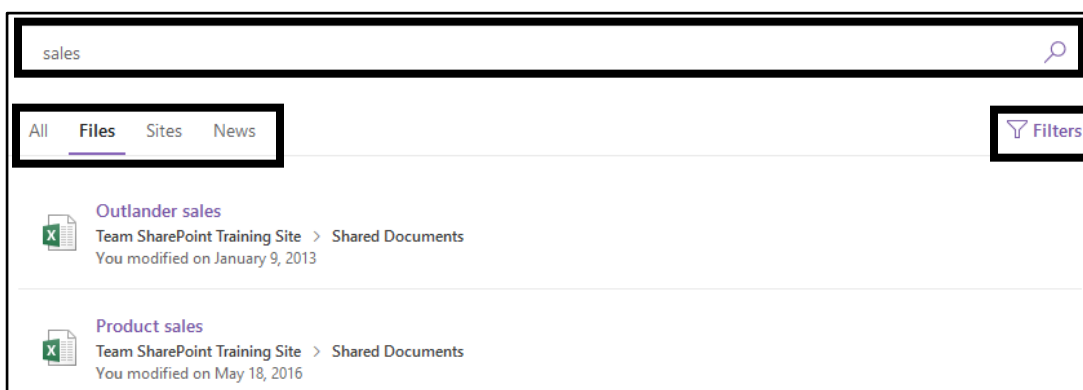
<p>Documents</p>	<p>Found on most SharePoint sites. Upload, create, update and collaborate on files with other site members. Searchable and sortable columns help to manage and organize content.</p>	
<p>List</p>	<p>Collection of data shared with other site members.</p>	
<p>Notebook</p>	<p>Contains sections and pages like a notebook. Can be edited by multiple people at one time.</p>	

Searching

A SharePoint site can house many pages, libraries and lists and if you do not know where something is it can be difficult to locate using site navigation. Because of this, SharePoint has a variety of search features for helping you to locate items on the site. The search feature can search the name of any part of a site, a file or folder name, file property or even the contents of files.

Most pages in a SharePoint site have a **Search this site** box at the top of the screen. If you do not see one, navigate to the Home page of the site.

1. To begin a search, type in your search term(s) in the **Search this site** box at the top of the screen.
2. The search results appear on the screen. To refine the search:
 - Type in additional terms to narrow your results
 - Use the tabs below the search box to view all **Files**, **Sites** or **News**
 - Click the **Filters** button on the right side of the screen to see other options

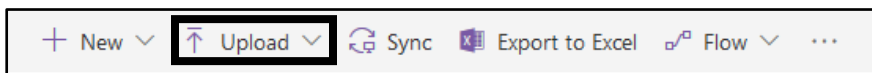


Using the Document Library

Most SharePoint sites contain one or more document libraries that house the files used by the members of the site. The library allows you to create, update and collaborate on files and provides basic information such as who last modified a file and when it happened. A document library is like a “super folder” and using the extensive searching, filtering and sorting tools in SharePoint you can quickly find files.

Upload Button

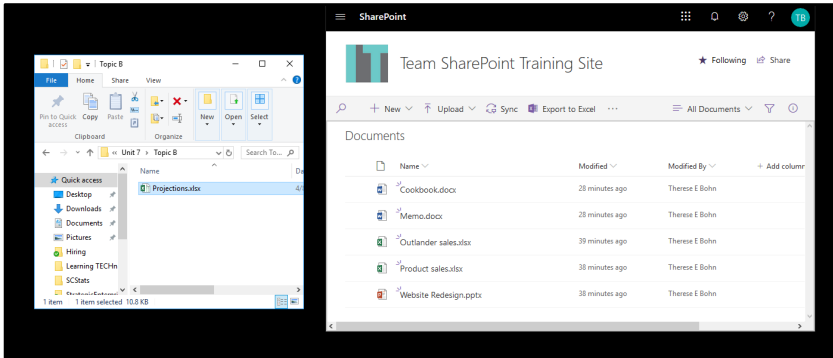
1. Navigate to the document library in the SharePoint site.
2. Click the **Upload** button on the library toolbar.



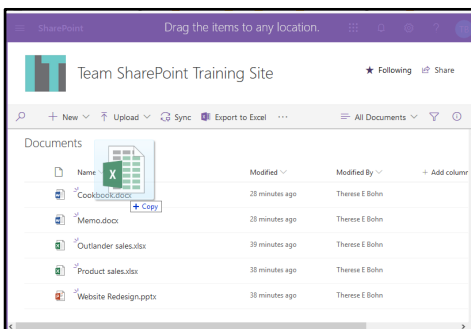
3. Choose **Files**, **Folder** or **Template** from the drop-down list.
4. If there are multiple files you want to upload, use **Shift + Click** or **Ctrl + Click** to select all the files.
5. Click **OK**. The file uploads to the library.

Drag and Drop

1. Navigate to the document library in the SharePoint site.
2. Locate the file on your computer by opening the folder where it is located.
3. Resize the browser window and the folder window so that you can see both on your screen.



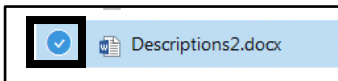
4. Left click and hold the file you want to upload then drag and drop it to the document library. Once you release the mouse button, the file upload begins. If there are multiple files you want to upload in the same folder, use **Shift + Click** or **Ctrl + Click** to select all the files before the drag and drop.



Download a File

If you would like a copy of a file on your computer in addition to the file on SharePoint, you can download files.

1. In the document library, locate the file you want to download and hover over the file and click inside the circle to the left of the file name to select the file.

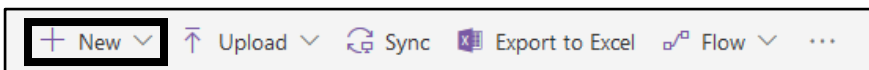


2. On the toolbar at the top of the screen, choose **Download**. When the confirmation box appears, choose to either open the file or save the file. Click **OK**.

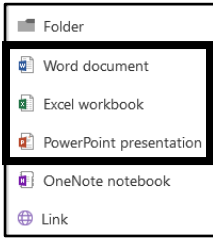
Create a New File

Because SharePoint is a part of Office 365, you can use the online versions of Microsoft Excel, PowerPoint and Word to create new files directly in SharePoint.

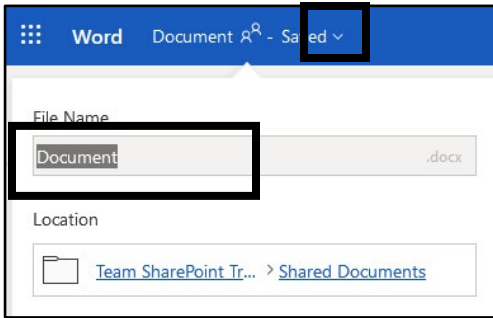
1. In the document library, click the **New** button on the library toolbar.



2. From the menu, choose the type of file you want to create.



3. The online version of the Office app you selected appears on the screen. To name the file, click the down arrow next to the default file name. In the drop down box that appears, type the desired name for the file.



4. Create the file. When finished, close the tab for the file to return to the SharePoint document library. Because the Office apps are integrated with Office 365, you do not have to save the file manually, it saves automatically.

View and Edit a File

If a file stored in the document library was created using Excel, PowerPoint or Word you can view and edit the file from within SharePoint or using your desktop versions of the applications. While the online versions of Excel, PowerPoint and Word contain many commonly used features, be aware that you may need to use the desktop version of the application to perform advanced actions.

To view and edit a file directly in SharePoint:

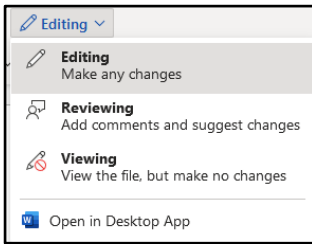
1. In the document library, click the name of the desired file.
2. This opens the online version of the application (Excel, PowerPoint or Word). Edit the file as needed. If you need to rename the file, you can change the name of the file by clicking the file name at the top center of the screen.
3. When you are finished editing, close the tab of the file to return to the document library.

NOTE: When editing a file directly from SharePoint, changes save automatically.

To open a file and edit using the desktop version of Office:

1. In the document library, click the file you wish to edit to open it online.

2. On the ribbon, click the **Editing** button and then choose **Open in Desktop App**.



3. The file opens in Excel, PowerPoint or Word on your computer. Edit the file as needed.
4. When you are finished editing, you must save the file for your changes to be reflected in the document stored on SharePoint. When you click the **Save** button or use the keyboard command (**Ctrl + S**) the right corner of the status bar indicates that the file is saving to SharePoint.

NOTE: Using this method, you cannot rename the file in Excel, PowerPoint or Word. You will need to rename the file using SharePoint. To do so, right click the file in the document library and choose **Rename** from the menu. However, you can use the **Save As** command in Excel, PowerPoint and Word to save the file with a different name in the SharePoint document library.

Search, Sort and Filter in a Library

Libraries can contain many items and there may be times when you cannot see all the items in the library on one screen. Visually scanning a library for a file can be difficult, but the searching and sorting tools in SharePoint make it easy to locate a file quickly. Searching in a library will search for the term or terms in any of the visible fields (**Name, Modified, Modified By**) and within the files themselves.

For a more specific search, you can use a prefix followed by a colon (:). For example, typing into the search box **author:"Therese E Bohn"** will return all documents in the library authored by Therese Bohn. The table below has additional search prefixes:

Prefix	What it does
author:	Searches the author field
modifiedby:	Searches the Modified By field
filename:	Searches file names
filetype:	Searches by file type (For example: docx, xlsx)

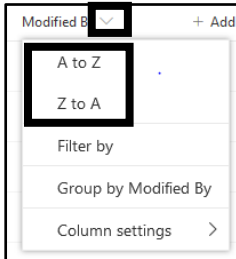
NOTE: When searching for a phrase, type it in quotes (" ") so SharePoint searches for the string of terms instead of the words individually.

1. Navigate to a document library within the SharePoint site.

- In the top center of the screen, locate the search box that says **Search**. Type your search term or terms in the box and press the Enter key on the keyboard to search.

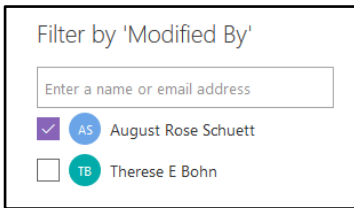


- To remove the search and see all items in the library, click the **X** in the search box.
- To change the sort order in the library, click the down-arrow to the right of the column name and choose the sort order.

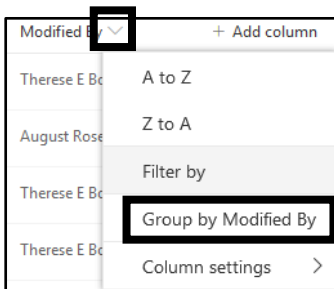


- To return to the original sort order, click the **All Documents** button on the toolbar and choose **All Documents**.
- To filter the library, click the down arrow to the right of the column name and choose **Filter by**. From the pane on the right, choose the filter criteria and then click **Apply**.

NOTE: You cannot filter by the file **Name** field.



- To remove the filter, click the **All Documents** button on the toolbar and choose **All Documents**.
- To group by records, click the down arrow next to the name of a column. From the menu, choose **Group by**.



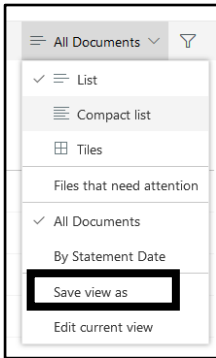
- To return to the default view of the document library, on the top toolbar, click the **All Documents** button. From the menu, choose **All Documents**.

Create a View

If you find that you are performing the same sort, filter or grouping each time you go into a folder, you can create a **view**. A view is a custom set of sort, filter or group options that you can save and then apply to a folder.

To create a view:

1. First, set the sort, filter and group options in the folder.
2. Click the **All Documents** button on the top toolbar. From the menu, choose **Save view as**.



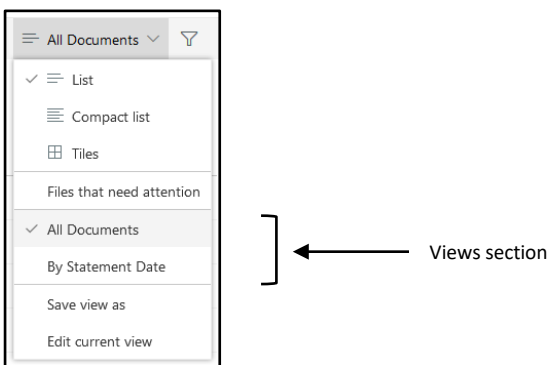
3. Name the view, check the box if you want to make the view public and then click **Save**. If you make the view public, other people using this folder can see and apply your view to the files.

To use a view:

1. On the top toolbar for the document library, click the **All Documents** button.



2. From the menu, locate the views section; the first item in the section will always be **All Documents**. Choose a view from the section.



3. To return to all the documents in the folder, click the button with the name of the view and choose **All Documents**.

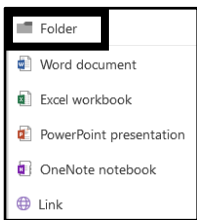
Using Folders

A SharePoint site is not the same as a traditional file storage location that utilizes folders to organize information. As seen in the previous section, SharePoint has robust searching and sorting features that let you quickly find the files you need. Searching and sorting allow the flexibility for customized searches, for example, one person may be interested in finding a specific file name while another is interested in seeing a file that was recently modified. When placed in a traditional folder structure, it may be more difficult to find a file using folder navigation.

In addition, SharePoint has a limit of 400 characters for web addresses. If you have files in folders and sub-folders, all the folder names are included in the web address and if you exceed the limit of characters for the web address, you cannot access your files. If you use folders in your SharePoint site, keep the name of the folder as short as possible.

To create a folder:

1. In the document library, click the **New** button on the toolbar and choose **Folder**.



2. Name the folder and then click the **Create** button. Remember to keep the name as short as possible to avoid exceeding the number of characters allowed in a SharePoint address.

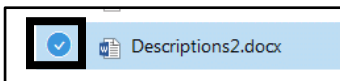
To move a file to a folder:

1. Locate the file you want to move to a folder. Hover over the name of the file until you see a circle to the left of the file name. Click inside the circle to select the file.
2. From the toolbar, click the ... (**ellipsis**) button and choose **Move to**.
3. Select the folder from the pane on the right and click **Move here**.

Deleting Files

If there are files in a document library that you no longer need, you can delete the files by moving them to the **Recycle bin**. Files will remain in the Recycle bin for 90 days, after that point, they move to the **Second-stage recycle bin** and you will need to contact the UWM Help Desk to retrieve the files. After 90 days, files are permanently deleted from the Second-stage recycle bin.

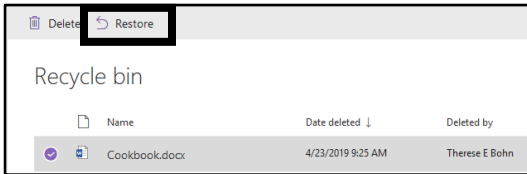
1. In the document library, locate the file you want to delete and hover over the file and click inside the circle to the left of the file name to select the file.



2. On the toolbar at the top of the screen, choose **Delete**. When the confirmation box appears, click **Delete**.
3. The file moves to the site Recycle bin.

NOTE: If you want to delete a folder, follow the same steps as above but select the folder instead of a specific file.

- To restore a file that you sent to the Recycle bin, in the navigation on the left side of the screen, click the link for **Recycle bin**.
- Locate the file you want to recover and check the box in front of it. Click the **Restore** button to return the file to its original location.



- To delete the file from the Recycle bin, click the **Delete** button, the file will move to the **Second-stage recycle bin**.

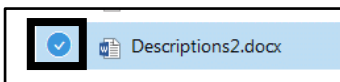
Collaborating in the Document Library

Once you have files in your SharePoint site, you can begin to collaborate with others using those files. This may include sharing the file, editing in real-time with others and setting up an alert.

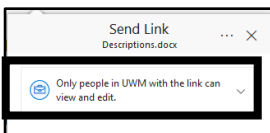
Share a File or Folder

If there is a file on your SharePoint site that you need to share with someone who is not a member of the SharePoint site, you can use the **Share** tool to share the file.

- In the document library, locate the file you want to share and hover over the file and click the circle to the left of the file name to select the file.

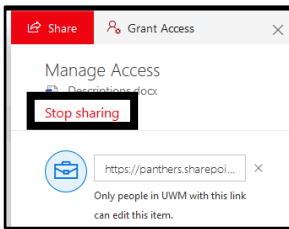


- On the toolbar at the top of the screen, click the **Share** button.
- In the box that appears, click the down-arrow for who the file is shared with.



- Anyone*: anyone can access the link with or without logging into Office365
 - People in UWM*: only people logged into Office365 from UWM can access the link
 - People with existing access*: does not change permissions but will send a link to someone who already has access
 - Specific people*: enter email addresses of specific people whom you want to give access to
- Choose an option from the list, if you want people to be able to edit the file, check the **Allow editing** box, otherwise. Click the **Apply** button.
 - If you are sharing with specific users, enter their email address and an optional message. Click **Send**.
 - If you are sharing a link, click the **Copy Link** button and then copy the link displayed in the dialog box.

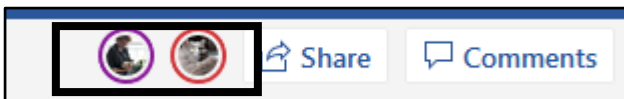
- If you no longer want to share the file, return to the **Share** dialog box and click the ... (**ellipsis**) button and choose **Manage Access**. In the pane on the right, click the link for **Stop sharing**.



Simultaneous Editing

In previous sections, you learned how to create and edit files using Excel, PowerPoint and Word online. In this section, you will see how to edit files with other members of the SharePoint site using simultaneous editing.

- In the document library, locate the file you want to simultaneously edit and click on the name of the file.
- This opens the online version of the application (Excel, PowerPoint or Word). When another user or users are simultaneously editing the document, you will see their person icons in the upper right corner of the screen. In addition, a cursor that coordinates to the color of their person icon will appear in the area of their changes.



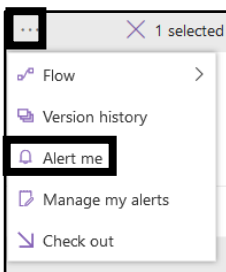
Alerts

An **Alert** allows you to monitor when changes are made to files or libraries. An alert can be set on a specific file or on an entire library.

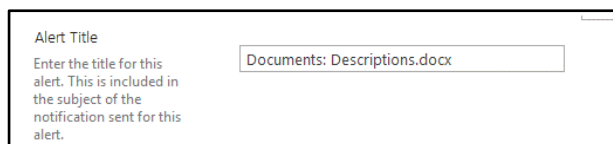
Setting an Alert on a File

Setting up an alert on a file will send you an email message when changes are made to a specific file.

- Select the file you would like to set up an alert for.
- On the top toolbar, click the ... (**ellipsis**) button and choose **Alert me**.



- Set the alert options as desired.
 - Alert Title:** Create a name for this alert.



- b. **Send Alerts for These Changes:** Choose which events trigger an alert.

Send Alerts for These Changes

Specify whether to filter alerts based on specific criteria. You may also restrict your alerts to only include items that show in a particular view.

Send me an alert when:

Anything changes

Someone else changes a document

Someone else changes a document created by me

Someone else changes a document last modified by me

- c. **When to Send Alerts:** Choose the frequency of the alerts.

When to Send Alerts

Specify how frequently you want to be alerted. (mobile alert is only available for immediately send)

Send notification immediately

Send a daily summary

Send a weekly summary

Time:

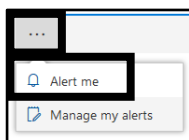
Monday ▼ 1:00 PM ▼

4. Click **OK** when finished. You will receive an email notifying you of the created alert.

Setting an Alert on a Library

Setting up an alert on a library will let you know if anything is changed in a library.

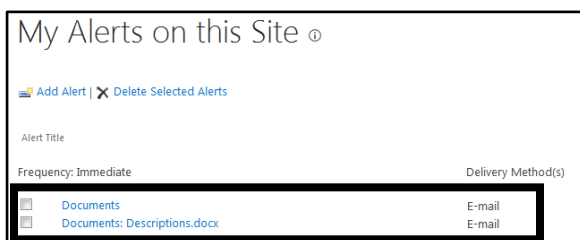
1. On the top toolbar, click the ... (**ellipsis**) button and choose **Alert me**.



2. Customize the settings of the alert and then click **OK**.

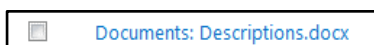
Managing and Deleting Alerts

1. On the top toolbar, click the ... (**ellipsis**) button and choose **Manage my alerts**.
2. You will see a list of your alerts for this SharePoint site.



To Manage an alert:

1. Select the alert that you would like to manage by clicking the title.



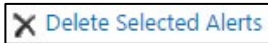
2. Make changes to the alert and click **OK** to save your changes.

To **Delete** an alert:

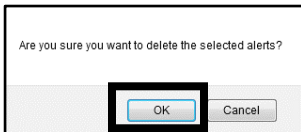
1. Select the alert that you would like to delete by checking the box next to it.



2. Click **Delete Selected Alerts** at the top of the page.



3. Click **OK** on the confirmation screen.



Using Lists

SharePoint **lists** allow you to store a table of data directly in SharePoint instead of within an Excel or Word file. A list allows multiple users to add, edit and delete from the list, and the ability to add alerts.

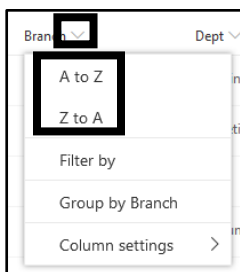
View, Search, Sort and Filter a List

Lists can contain many items and there may be times when you cannot see all the items in the list on one screen or you want to see a relevant item or items. Searching, sorting and filtering makes it easy to locate a list item; these tools work the same way as they do in a document library.

1. Locate and open the list on the SharePoint site.
2. In the top center of the screen, locate the search box that says **Search**. Type your search term or terms in the box and press the Enter key on the keyboard to search.

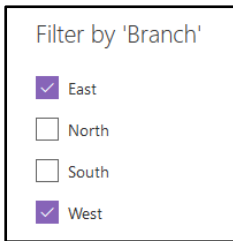


3. To view all list items, click inside the search box and then click the **X**.
4. To change the sort order in the list, click the down-arrow to the right of the column name and choose the sort order.

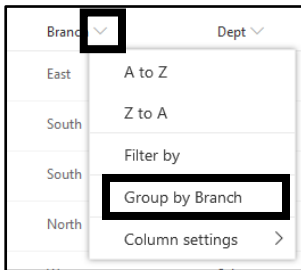


5. To return to the original sort order, click the **All Items** button on the toolbar and choose **All Items**.

- To filter the list, click the down arrow to the right of the column name and choose **Filter by**. From the pane on the right, choose the filter criteria and then click **Apply**.



- To remove the filter, click the **All Items** button on the toolbar and choose **All Items**.
- To group by records, click the down arrow next to the name of a column. From the menu, choose **Group by**.



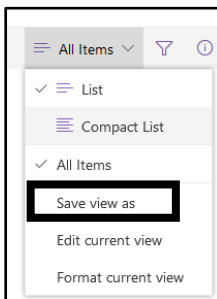
- To return to the default view of the document library, on the top toolbar, click the **All Items** button. From the menu, choose **All Items**.

Create a View

If you find that you are performing the same sort, filter or grouping each time you look at a list, you can create a **view**. A view is a custom set of sort, filter or group options that you can save and then apply to a list.

To create a view:

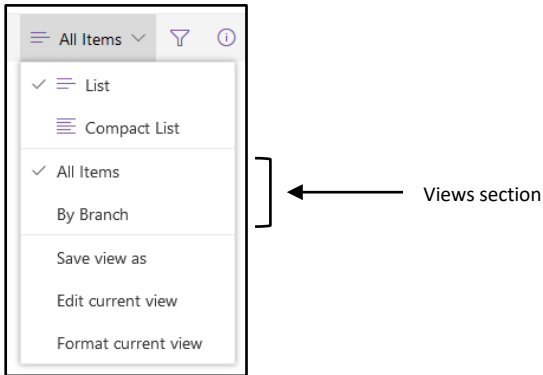
- First, set the sort, filter and group options in the list.
- Click the **All Items** button on the top toolbar. From the menu, choose **Save view as**.



- Name the view, check the box if you want to make the view public and then click **Save**. If you make the view public, other people using this folder can see and apply your view to the files.

To use a view:

1. On the top toolbar for the list, click the **All Items** button.
2. From the menu, locate the views section; the first item in the section will always be **All Items**. Choose a view from the section.



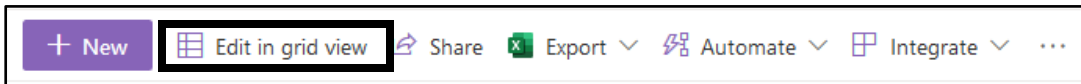
3. To return to all the documents in the folder, click the button with the name of the view and choose **All Items**.

Add a List Item

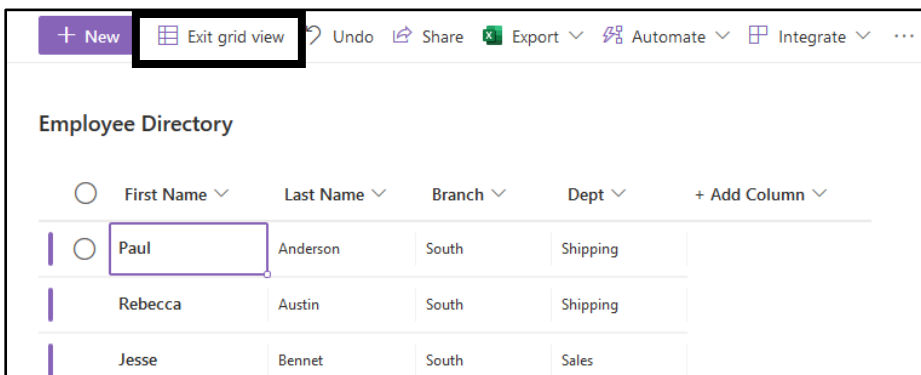
1. Click the **New** button at the top of the list; this will open a pane on the right side of the screen with a form containing all the fields in the list.
2. Fill in the fields and click **Save** when finished.

Edit a List Item

1. From the top toolbar, choose **Edit in grid view**.

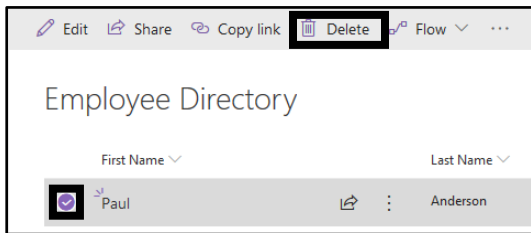


2. Edit the list and then click the **Exit grid view** button.



Delete a List Item

1. Locate the row you want to delete and click inside the circle that appears to the left of the row. On the top toolbar, click the **Delete** button.



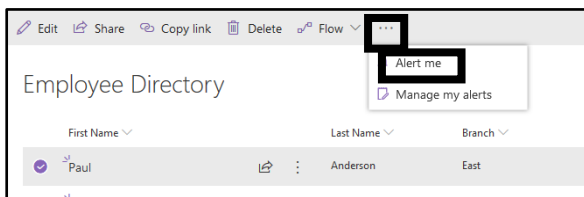
2. Click **Delete** in the confirmation box.

Alerts

You can create an **alert** on both individual list items and on an entire list. Once you are in the alert window, the options are the same as the alerts in the document library.

To set an alert on a list item:

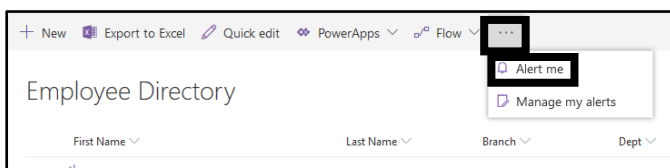
1. Locate the row where the alert should be set and click the circle to the left of the list item. On the top toolbar click the ... (**ellipsis**) button; from the menu choose **Alert me**.



2. Customize the settings of the alert and then click **OK**.

To set an alert on a list:

1. On the top toolbar, click the ... (**ellipsis**) button and from the menu choose **Alert me**.



2. Customize the settings of the alert and then click **OK**.

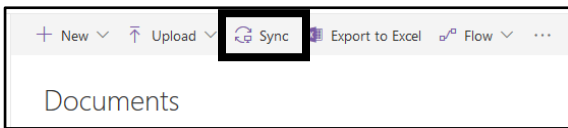
Sync a Document Library

If you have the OneDrive sync client, you can sync a SharePoint document library. When a SharePoint library is synced with your computer, you do not need to use a web browser to access the document library; the library is synced on your computer and you access the files just as you would with files on your computer. When you edit or create new files in the synced folder, the changes are reflected in the SharePoint library.

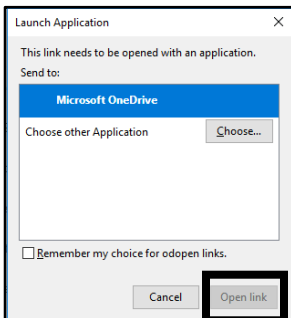
For more information about getting the OneDrive sync client, either contact your IT department or visit the UWM KnowledgeBase at uwm.edu/kb and search for **OneDrive sync**.

Once you have the OneDrive sync client installed, follow the steps below to sync a SharePoint library.

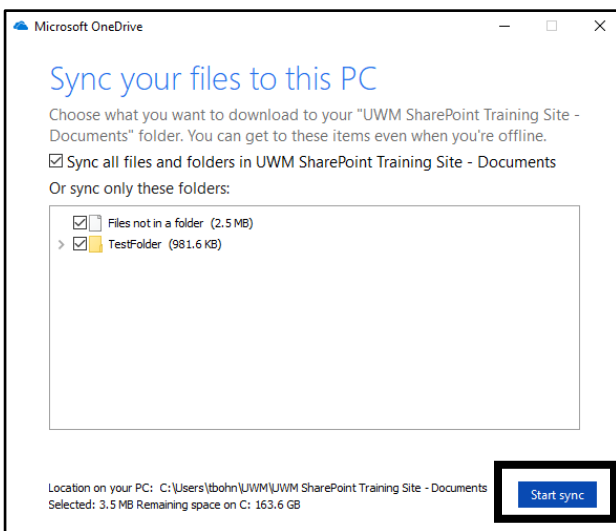
1. In Office365, navigate to the SharePoint document library you want to sync.
2. On the top toolbar of the document library, click the **Sync** button.



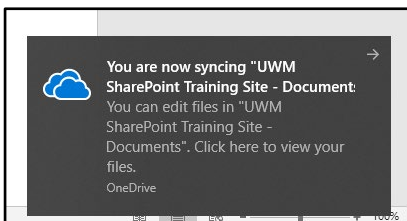
3. In the pop-up window that appears, click **Open link**.



4. You may be prompted to log into OneDrive; log in using your email address and password.
5. The next window that appears shows you folders that will sync. Make sure that all folders are checked that you want to sync. If you do not have any folders, make sure that **Files not in a folder** is checked so that your files sync properly. Click **Start sync**.



6. You will get a confirmation of the sync; depending on how many files are in the library, the full sync may take time to complete.



7. Once the sync completes, open **File Explorer** and in the pane on the left, choose **UWM**. From there you will see your SharePoint library.

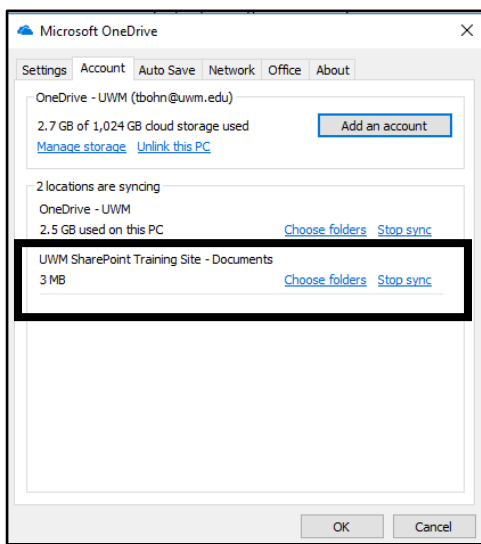
Stop Syncing

You may want to stop syncing the library if you are no longer using the SharePoint space.

1. On the Windows **taskbar** in the lower right corner, click on the OneDrive icon.



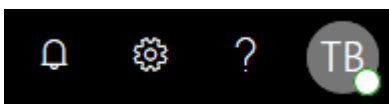
2. Navigate to **Settings**.
3. Click **Stop sync** on the library you want to stop syncing.



Sign Out

When you are finished with Office 365, you should sign out before closing the browser window.

1. Click the person icon or your photo in the top, right corner of the screen.



2. In the menu, choose **Sign out**.
3. You are now signed out of Office 365; close the browser to complete the process.

Getting Help

For a full listing of all Short Courses offered and training manual downloads, visit: uwm.edu/techtraining. For 24/7 access to online technical training videos, visit uwm.edu/linkedinlearning.

For technical assistance after this course is over, contact the UWM Help Desk:

- By phone: (414) 229-4040 or toll-free (877) 381-3459
- Website: uwm.edu/helpdesk
- Walk-In: Bolton 225A & Library Learning Commons (Monday-Friday, 8 am-5 pm)