SharePoint Online
Introduction

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Class Topics

- Understanding SharePoint Online
- SharePoint Online Structure
- Navigating a SharePoint Site
- SharePoint Content Categories
- Working with Pages
- Working with Lists
- Working with Libraries

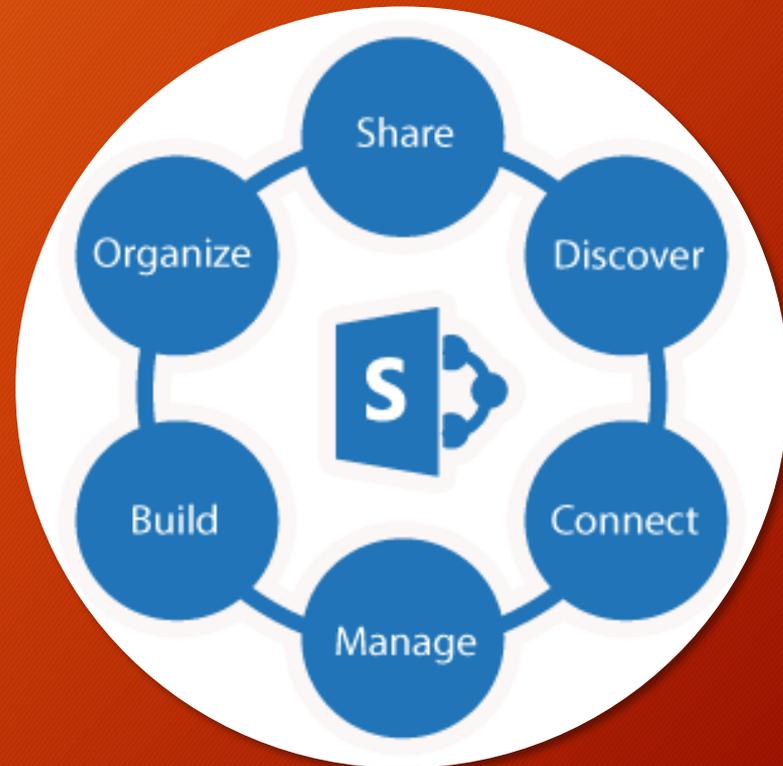# Understanding SharePoint Online

Understanding SharePoint Online

- SharePoint Online is part of the Office 365 suite of products and services that includes things like the Office Online apps, OneDrive for Business, and Skype for Business.
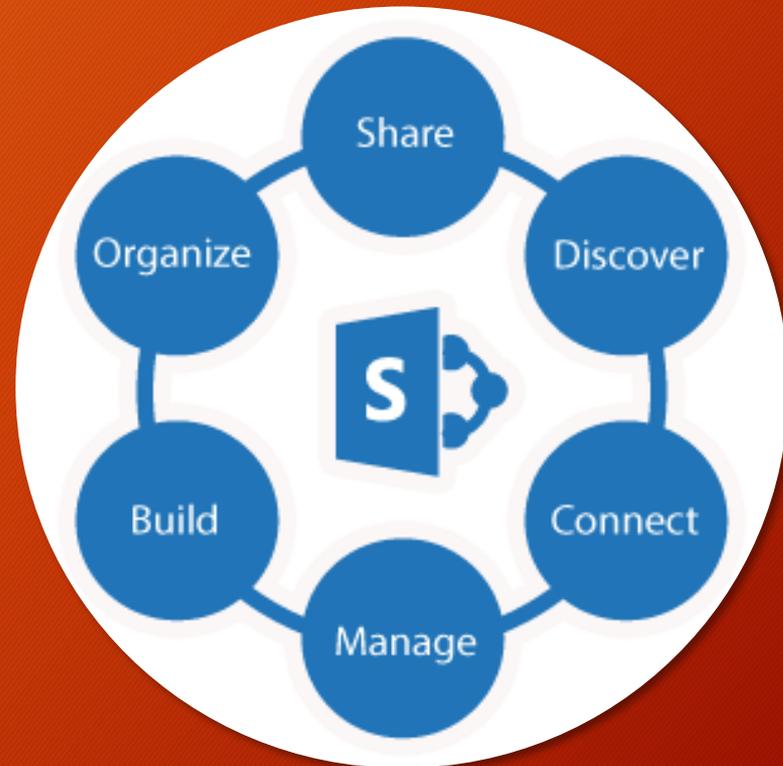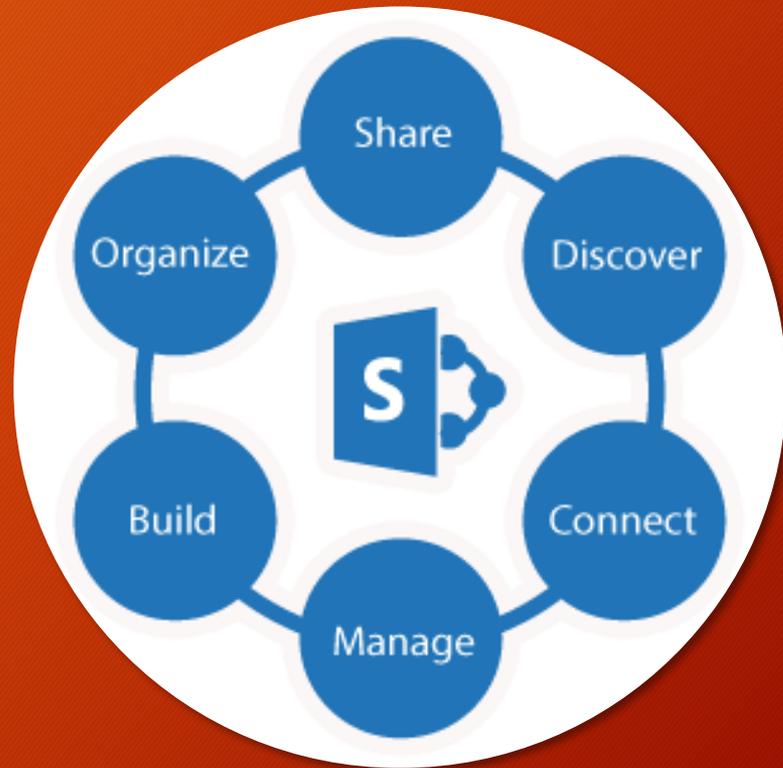
Understanding SharePoint Online

- As an online service and part of Office 365, SharePoint Online no longer has a version number.

- The "version" is always current.

Understanding SharePoint Online

- SharePoint Online is a web-based document and content management system that allows users to work in a collaborative environment that encourages and facilitates the sharing of ideas and information.
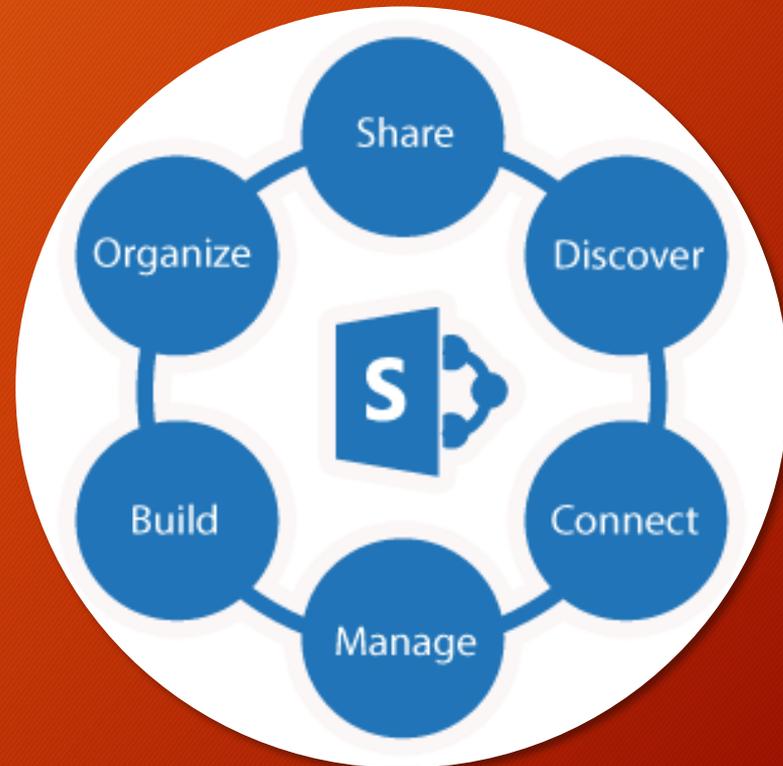
Understanding SharePoint Online

- SharePoint can be used to create and manage interactive web sites and their content.
  - Portals
  - Intranets
  - Extranets
  - Standard websites
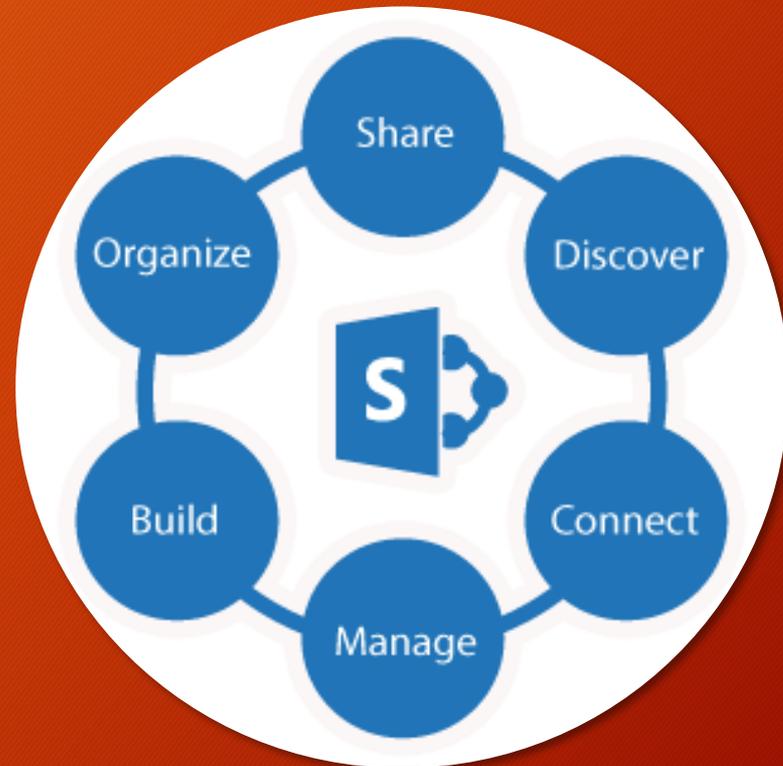
Understanding SharePoint Online

- SharePoint Online has many content and process features that enable users to share, discover, organize, and manage information.

Understanding SharePoint Online

CONTENT FEATURES

- Libraries
- Lists
  - Calendars
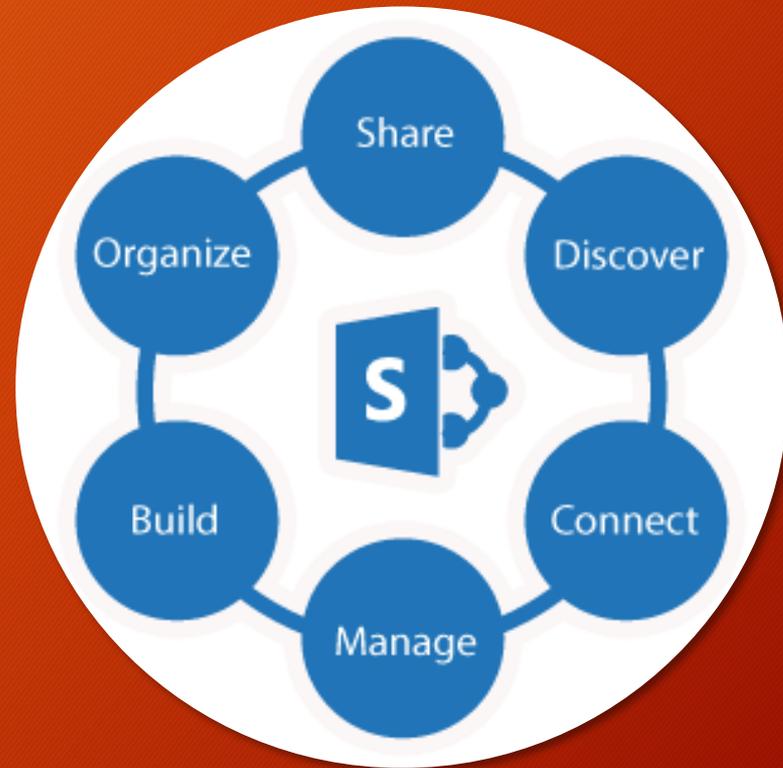 - Contact lists
  - Tasks / Issue Tracking
  - Surveys
  - Announcements
  - Discussion boards
- Pages

PROCESS FEATURES

- Workflows
- Content approval
- Alerts
- Check in/out
- Versioning
- Web parts
- Views

Understanding SharePoint Online

- SharePoint is highly customizable and configurable, allowing departments and organizations to create sites catered to their specific needs.

Understanding SharePoint Online

- Sites and features can go from basic or "out of the box", all the way to highly customized and created by SharePoint developers.
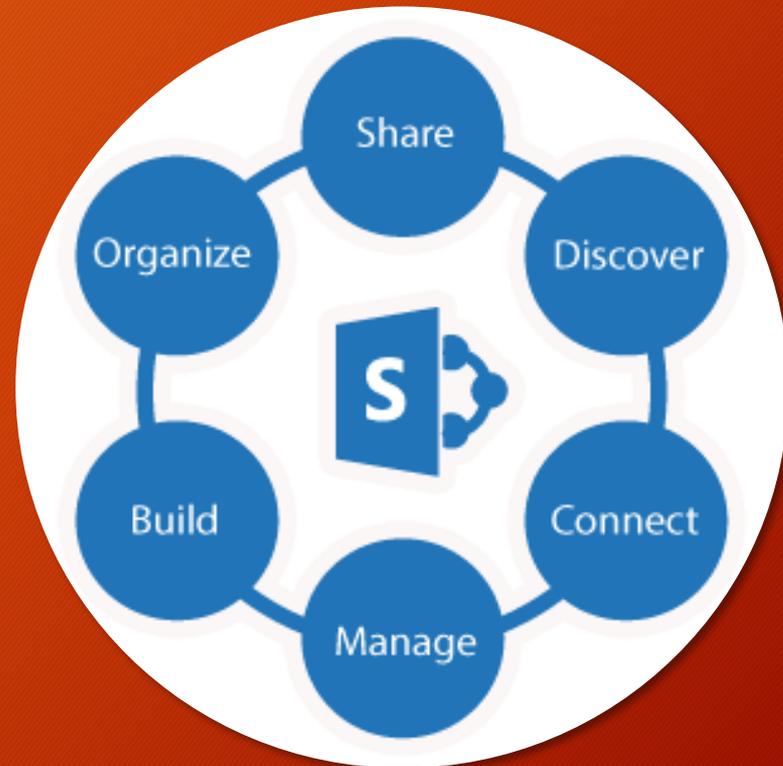
Understanding SharePoint Online

SUMMARY

- SharePoint Online is a highly customizable and flexible solution for managing documents, content, and information.
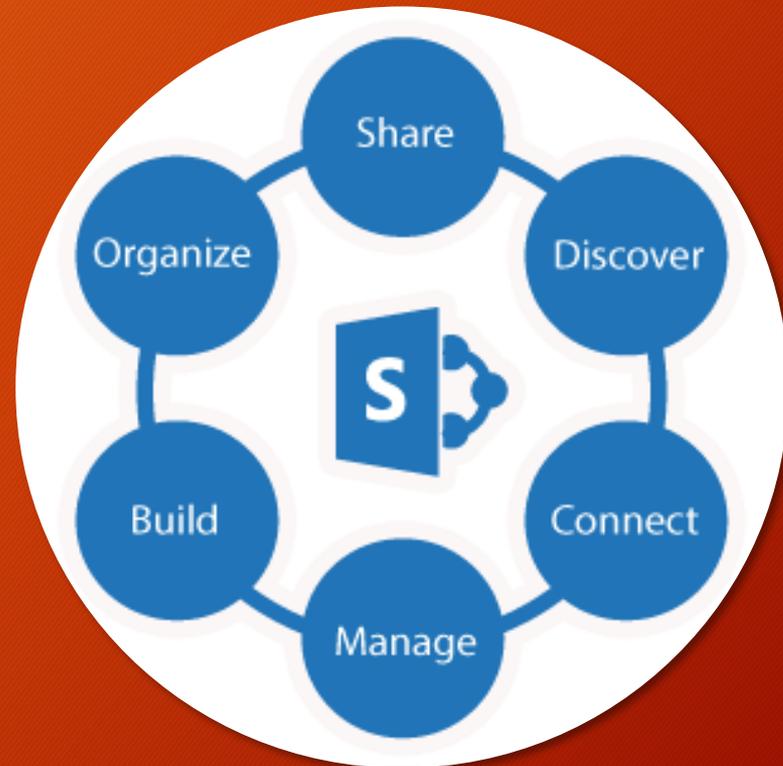
SharePoint Online Structure

SharePoint Online Structure

- A SharePoint site has a standard "tree-like" hierarchical structure.
- Three basic units
  - Site collection
  - Site
  - Subsite
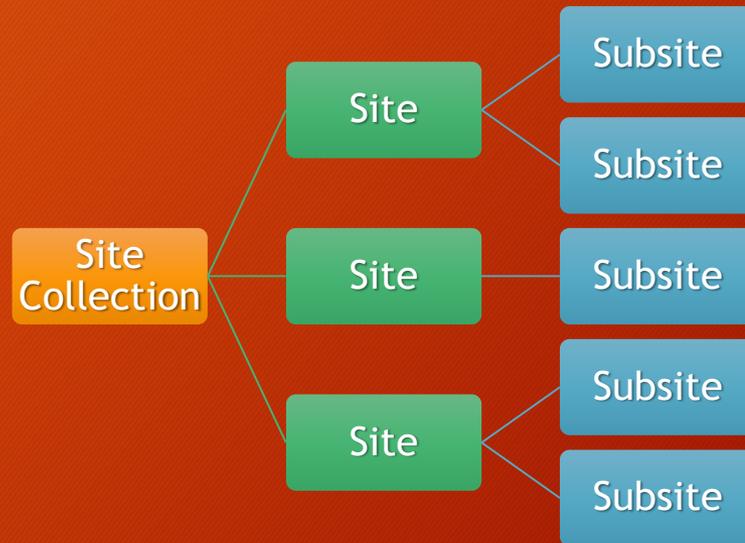
SharePoint Online Structure

- Site designers have many tools and great flexibility in overall site design and structure.
  - The organization of a site depends on the needs of the organization.
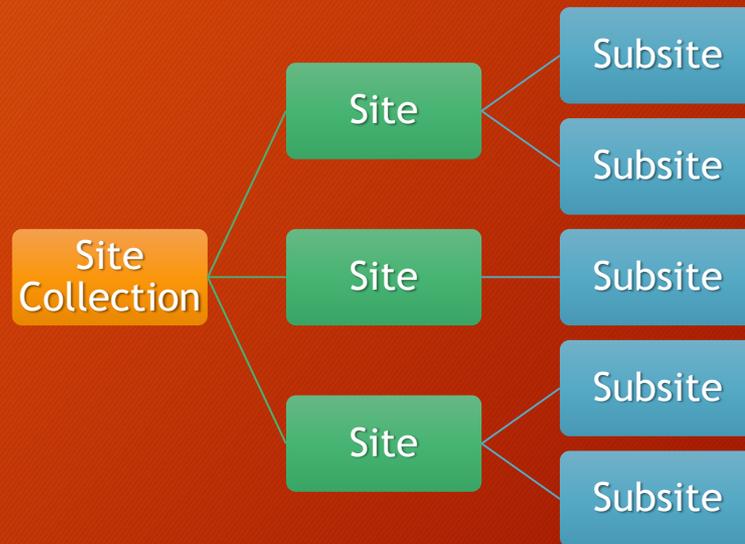
SharePoint Online Structure

- A SharePoint **Site Collection** is a top-level SharePoint site and all of its children.
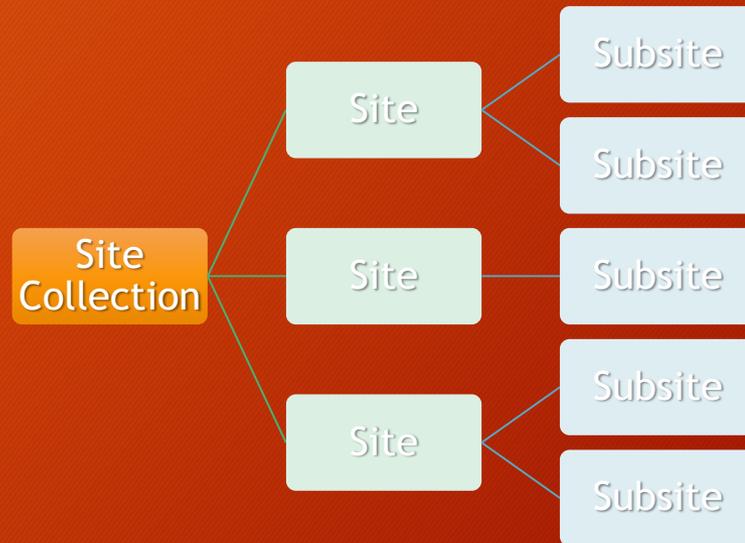
SharePoint Online Structure

- Your company may have multiple site collections.
  - For instance, a site collection for internal use, and a second site collection for external access and use.
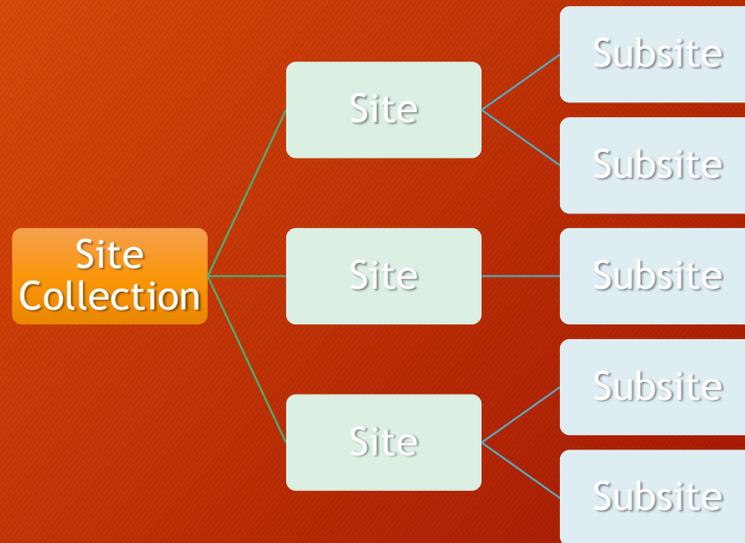
SharePoint Online Structure

- A **Site** is a collection of pages, lists, and libraries that are organized around a common purpose or goal.
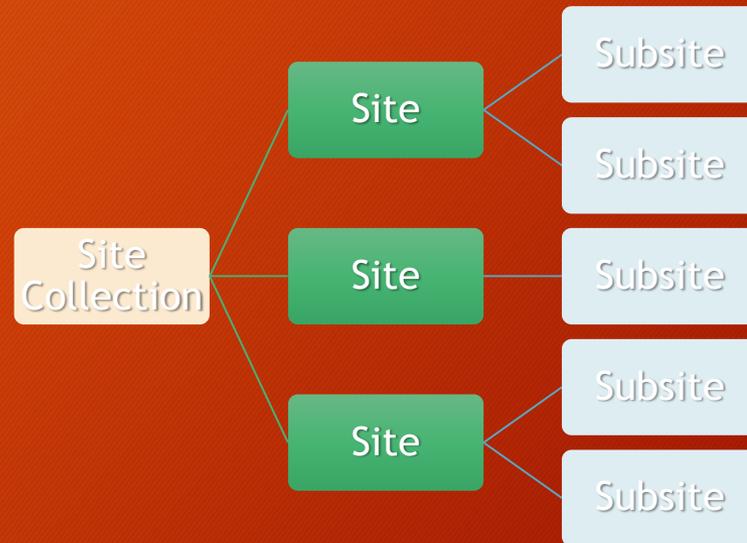
SharePoint Online Structure

- An individual site may be basic and have just a few SharePoint content features, or it may be complex and customized and possess many content features.

Site Collection

Site

Site

Site

Subsite

Subsite

Subsite
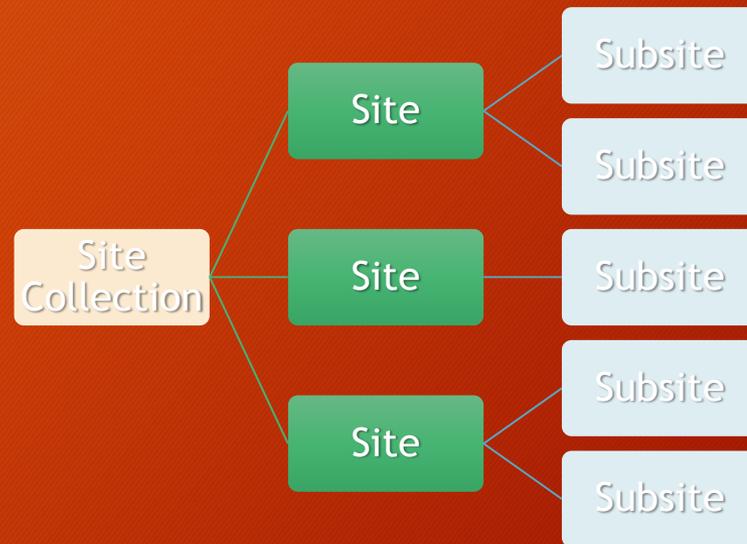
Subsite

Subsite

SharePoint Online Structure

- Example sites
  - Single department site
  - Project site
  - Meeting site
  - Research gathering site
  - Cross-department shared site
  - Company information site
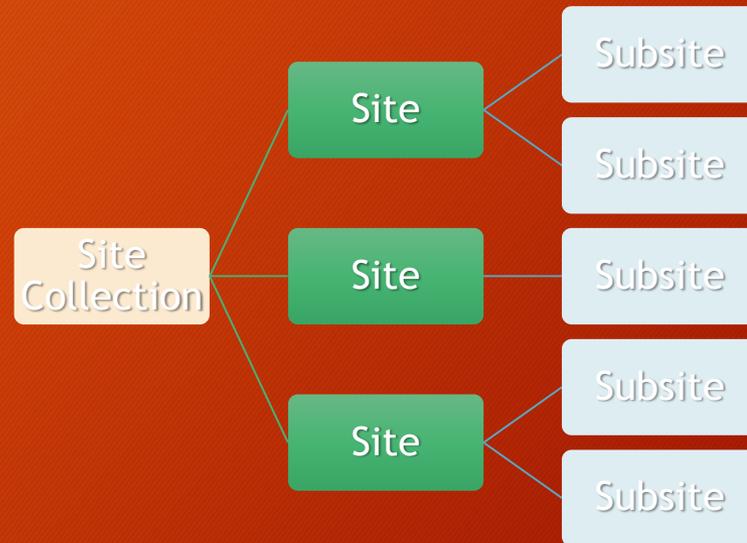
SharePoint Online Structure

- A **Subsite** is a site that shares the base URL of its parent site.
  - Technically, sites are just subsites of the site collection.
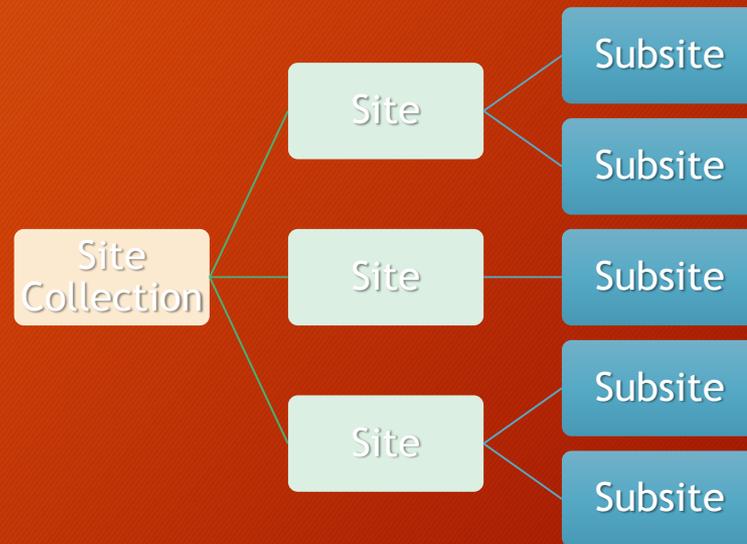
SharePoint Online Structure

- Subsites can have subsites.
- A subsite can inherit permissions and navigation from its parent site, or it can be independent.
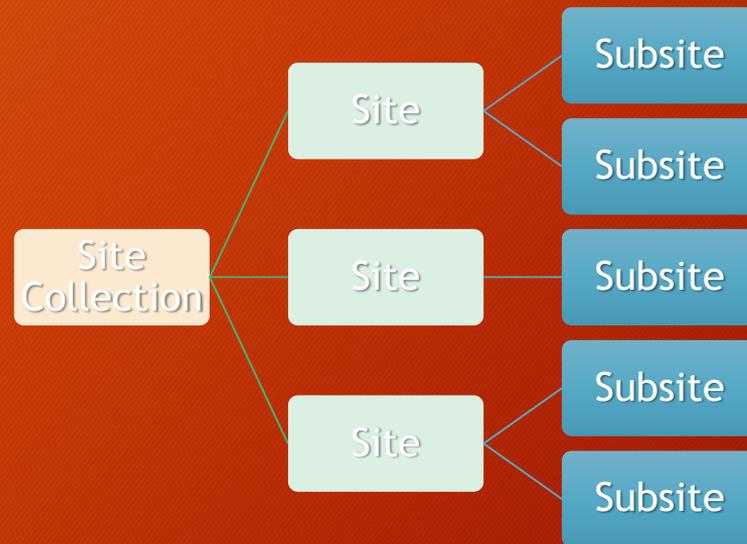
SharePoint Online Structure

- In the context of DOE, these structure units relate to a URL in the following manner:

https://usdoe.sharepoint.com/sites/OCIO/impmo/coreteam

| Site Collection | Site | Subsite |

SharePoint Online Structure

SUMMARY

- The basic building block of SharePoint is a site.

- A site should be organized around a common function, project, or team.
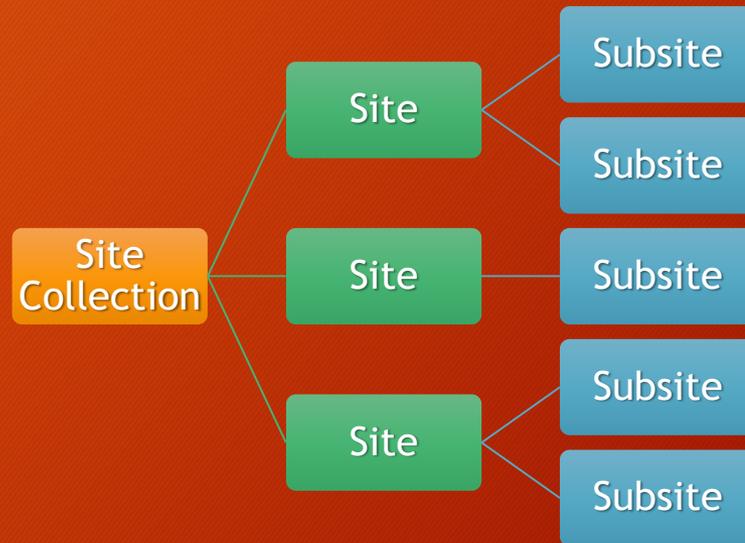
Navigating a SharePoint Site

Navigating a SharePoint Site

- There are four main user interface elements that are used to navigate a SharePoint site.
  - Breadcrumb trail
  - Top link bar
  - Quick launch menu
  - Site contents
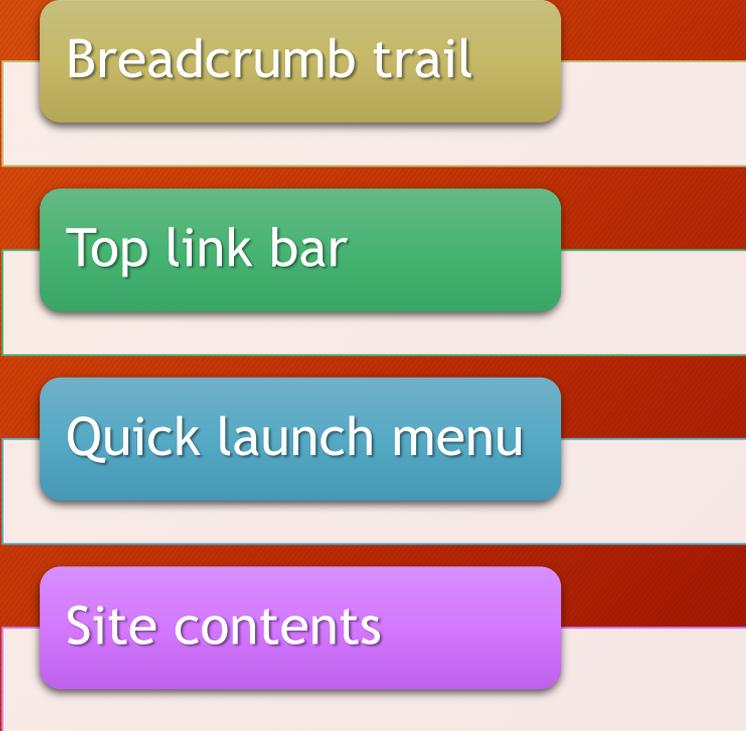
Breadcrumb trail

Top link bar

Quick launch menu

Site contents

Navigating a SharePoint Site

- Not all pages or sites will have all of these elements present.
  - Designers are free to design and adapt sites as they choose.
  - Your access rights (security) may prevent you from using or seeing certain elements.

Breadcrumb trail

Top link bar

Quick launch menu

Site contents

Navigating a SharePoint Site

- The **Breadcrumb Trail** is a series of links found at the top of a site that displays the path of where you are.

Breadcrumb trail

Top link bar

Quick launch menu

Site contents

Navigating a SharePoint Site

- The links can be used to navigate up the site.
- You may need to click the **Browse** tab of the ribbon to see the breadcrumb trail.
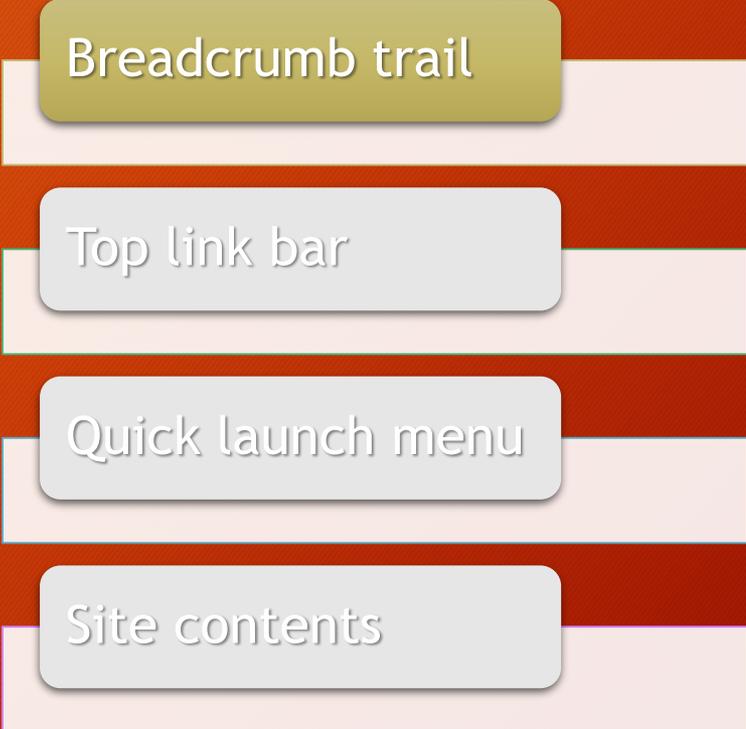
Breadcrumb trail

Top link bar

Quick launch menu

Site contents

Navigating a SharePoint Site

- The **Top Link Bar** displays links to other SharePoint content such as sites, subsites, lists, or libraries.

- The links may also be drop-down menus that display several links.

Breadcrumb trail

Top link bar

Quick launch menu

Site contents

Navigating a SharePoint Site

- Usually found above the breadcrumb trail.
- Generally has links to other sites in the site collection, or subsites of the current site.

Breadcrumb trail

Top link bar

Quick launch menu

Site contents

Navigating a SharePoint Site

- The **Quick Launch Menu** displays links to other SharePoint content.

- Generally these are links to content within the current site.

Breadcrumb trail

Top link bar

Quick launch menu

Site contents

Navigating a SharePoint Site

- Has the same basic function as the top link bar (a set of links you can follow).

- Has a **Recent** section for links within the site that you've visited recently.

Breadcrumb trail

Top link bar

Quick launch menu

Site contents

Navigating a SharePoint Site

- **Site Contents** displays a page of all the content found on a SharePoint site.
  - The quick launch menu and the top link bar have limited space, so they generally display popular or frequently used links or content.

Breadcrumb trail

Top link bar

Quick launch menu

Site contents

Navigating a SharePoint Site

- Site contents can be accessed from the **Settings** menu on the SharePoint navbar (gear icon in the upper right corner).
  - A SharePoint designer or owner may add this link to the quick launch menu.

Breadcrumb trail

Top link bar

Quick launch menu

Site contents

Navigating a SharePoint Site

SUMMARY

- All SharePoint sites have four basic navigation elements, however, they may be hidden or customized by the site owner.

Breadcrumb trail

Top link bar

Quick launch menu

Site contents

SharePoint Content Categories

SharePoint Content Categories

- Almost all features and items on SharePoint fit into one of these three categories.
  - In SharePoint, these are now called "apps".

Pages

Lists

Libraries

SharePoint Content Categories

- There are exceptions.
  - Some apps don't fit into any of these groups.
  - Some apps can fit into more than one group (hybrid).

Pages

Lists

Libraries

SharePoint Content Categories

- In the next three sections, we'll look at what each category is and what its primary function is on a SharePoint site.

Pages

Lists

Libraries

Working with Pages

Working with Pages

- Pages are generally the first type of content you encounter on a SharePoint site.
  - Just like the internet, this is the first thing you see when you access a site.
  - Home page.

Pages

Lists

Libraries

Working with Pages

- Pages display content and information.
  - Some content may be part of the page.
  - Some content may come from other sources by way of web parts.
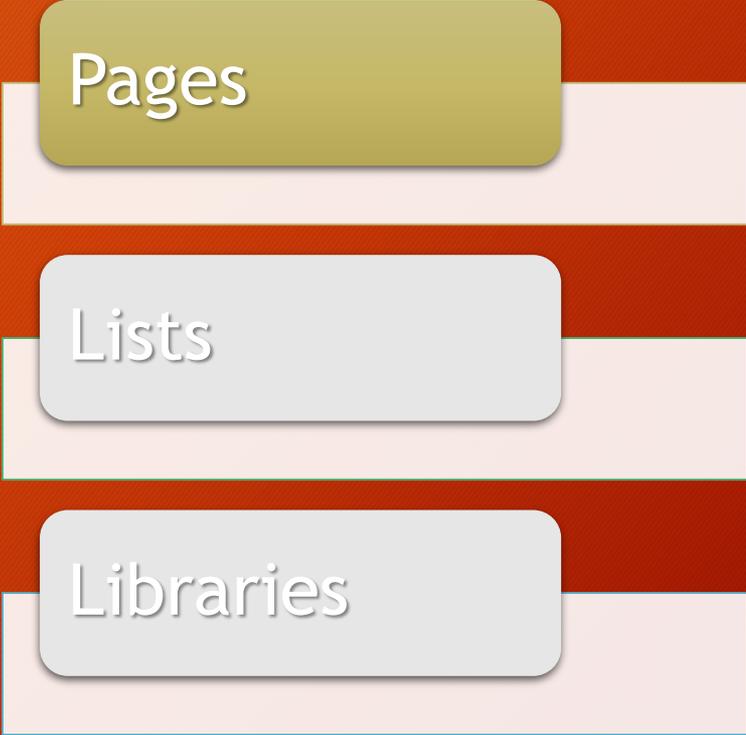
Pages

Lists

Libraries

Working with Pages

- **Web parts** are containers or "mini-windows" that display content from other places on the site.
  - A view of a list
  - Files from a library
  - A calendar
  - List of announcements

Page

Web Part	Web Part
Web Part	
Web Part	Web Part

Working with Pages

- The home page of a SharePoint site is usually a **web part page**.
  - Could be a single web part up to several on a page.

Page

Web Part	Web Part
Web Part	Web Part
Web Part	

Working with Pages

- Since web parts get their information from other sources, the information that is displayed may change frequently and/or is updated automatically.

Page

Web Part

Web Part

Web Part

Web Part

Web Part

Working with Pages

- You can access and work with the information as it is displayed in the web part, or (in most cases) you can click the web part title to be taken to the actual source list or library.

Page

Web Part

Web Part

Web Part

Web Part

Web Part

Working with Pages

SUMMARY

- Pages display content.
- Most pages are made up of web parts.
- Web parts display dynamic content from sources such as lists and libraries.

Pages

Lists

Libraries

Working with Lists

Working with Lists

- Lists are information repositories in SharePoint.
  - List information "resides" or "lives" in SharePoint.
  - List data is **<u>not</u>** contained in a document or file.

Pages

Lists

Libraries

Working with Lists

- Lists store data and information, not files.
- List data is organized into columns and rows like an Access table or Excel spreadsheet.

Pages

Lists

Libraries

Working with Lists

- Lists have a lot in common with Excel, and in some cases, may be a better option for data or information, especially if there is no math or formulas involved.

Pages

Lists

Libraries

Working with Lists

- SharePoint has many built-in/pre-made list templates and types, called apps.
    - These apps can be used as-is, or can be customized after they are created.

List Apps
Calendars
Contacts
Announcements
Tasks
Links
Discussion Boards
Issue Tracking
Surveys

Working with Lists

- Custom lists can be created when there isn't an app that meets your needs.
  - Essentially, this is creating a list from scratch.

Custom Lists
Grant Data
Science Data
Research Data
Web Usage Report
References List
Accomplishments
Registrations
Frequently Asked Questions

Working with Lists

- The actions that you can perform in a list depend on the permissions that you've been granted in that particular list.

Working with Lists

- Permissions can be as basic as view only, all the way up through full control of the list.
  - For more specific details about each permission level, consult the SharePoint Online help.

Full control

Design

Edit

Contribute

Read

View Only
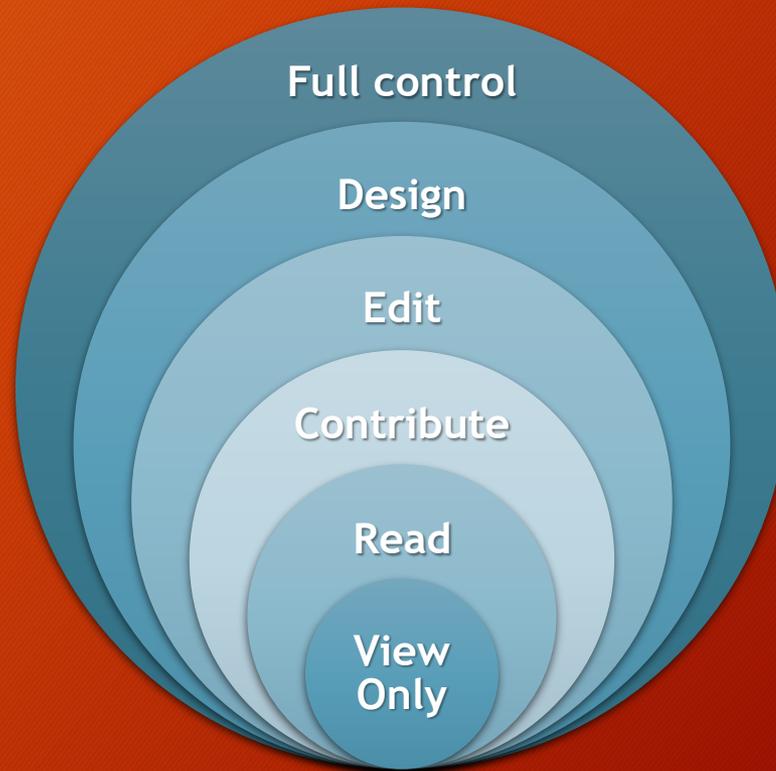
Working with Lists
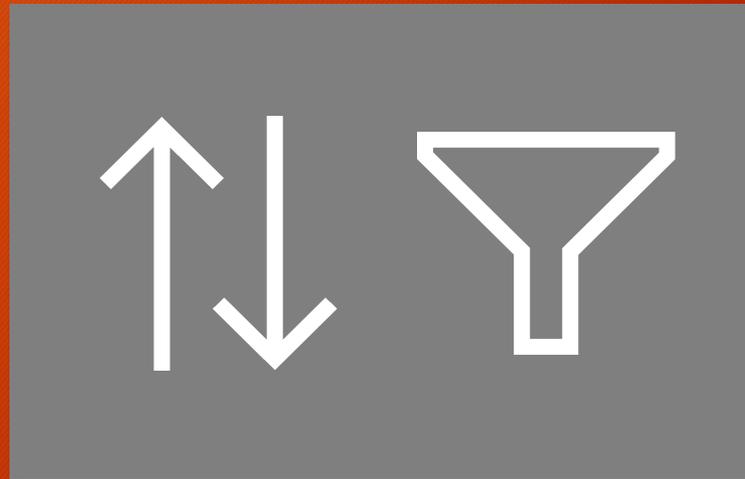
- Lists display items in organized columns and rows, however, not all columns may be currently visible.

- Click the item link (usually the first column) to display an item's details.

Working with Lists

- List data can be sorted and filtered, just like an Excel worksheet or an Outlook email list.
  - Click any column header to sort.
  - Click header drop-down menu to sort and/or filter.

Working with Lists

- If you have the correct permissions, you can add new items to the list.
    - Use the **New Item** button at the top of the list.
    - Use the **New Item** button on the ribbon.

Working with Lists

- If you have the correct permissions, you can edit or modify the items in a list.
  - View the item, then select **Edit Item** on the ribbon.
  - Select the item in the list and then click **Edit Item** on the ribbon.

Working with Lists

- List don't always display all available data and items.

- Views can be created to hide, sort, filter, and group what data is displayed.

- Available views are listed just above the column headers

Working with Lists

SUMMARY

- Lists are information and data repositories.

- Lists do not store files.

- Lists (generally) present information in columns and rows.

- Lists have a lot in common with Excel.

Pages

Lists

Libraries

Working with Libraries

Working with Libraries

- Like the network, SharePoint libraries are where files and content are stored.
  - Word documents
  - Excel spreadsheets
  - PowerPoint presentations
  - PDF files
  - Photos and pictures

Pages

Lists

Libraries

Working with Libraries

- Unlike the network, SharePoint libraries have additional features and functions for working with files.
  - Version control
  - Check in/out
  - Content approval
  - Workflows
  - Sharing and collaboration

Pages

Lists

Libraries

Working with Libraries

- Libraries have many advantages over traditional file storage and "sharing" options such as email and networks.
  - A full discussion of this topic is covered in the Library Basics class.

Pages

Lists

Libraries

Working with Libraries

- Just as with lists, SharePoint has many built-in/pre-made library templates and types, called apps.
  - These apps can be used as-is, or can be customized after they are created.

Library Apps
Document library
Form library
Wiki page library
Picture library
Data Connection library
Asset library
Report library

Working with Libraries

- The most common type of library is a **Document library**.
  - All other library types are based off of a document library.
  - The other types have specific uses or extra features to support certain file types.

| Library Apps |
| --- |
| **Document library** |
| Form library |
| Wiki page library |
| Picture library |
| Data Connection library |
| Asset library |
| Report library |

Working with Libraries

- The actions that you can perform in a library depend on the permissions that you've been granted in that particular library.
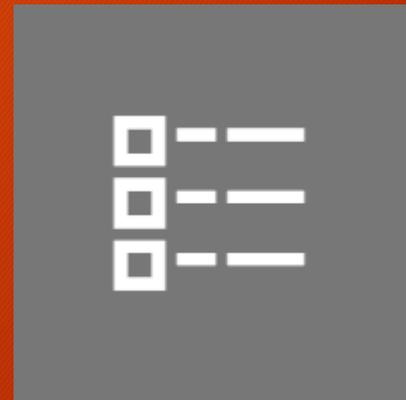
Working with Libraries

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  - For more specific details about each permission level, consult the SharePoint Online help.
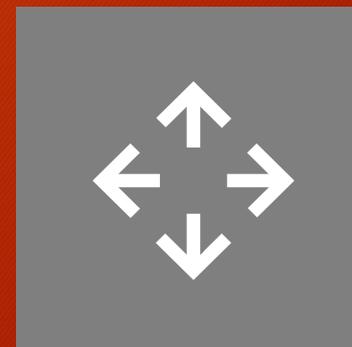

Full control

Design

Edit

Contribute

Read

View Only
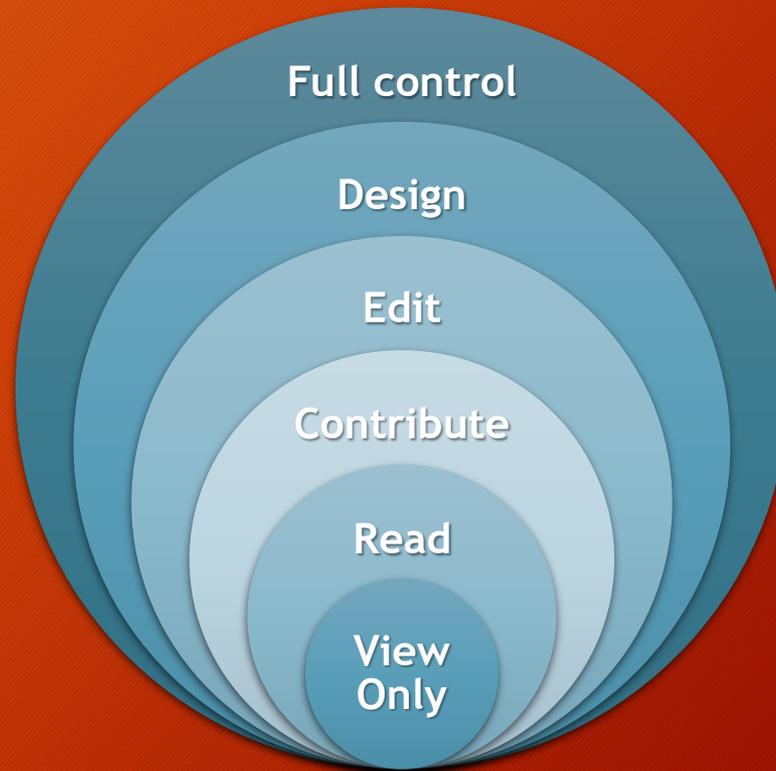
Working with Libraries

- Libraries look and act very similar to file directories in Windows or on the network.
  - Folders first, A-Z
  - Files, A-Z

Working with Libraries

- Files can be added to a library by several methods.
  - Upload.
  - Create as new in library.
  - Save to library from Office.
  - Copy/paste/drag using Windows Explorer

Working with Libraries

- When opening an Office document to preview or edit it, one of two things will happen.
  - Document opens into Office online app (web version).
  - Document opens into Office desktop app (Windows version).

Working with Libraries

- The default for SharePoint Online is to open documents into the related Office Online app.
  - The desktop version can be accessed from the online version.
  - Edit

Working with Libraries

- However, the library (or site) owner can change the default behavior and have the document open directly into Office desktop.
  - This is the behavior you're used to if you've used a previous version of SharePoint.

Working with Libraries

- If Office Online is the default, you can skip it and go directly to Office desktop.
  - Select the document (don't click the name), and then click **Edit Document** on the ribbon.

Working with Libraries

- With appropriate permissions, users can create folders.

- However, the use of folders is discouraged in SharePoint.
  - Reasons why and alternatives are discussed in the Library Basics class.

Working with Libraries

SUMMARY

- Libraries are file repositories.
- Libraries are similar to Windows or network.
- Several methods to get files into library.
- Use of folders is discouraged.
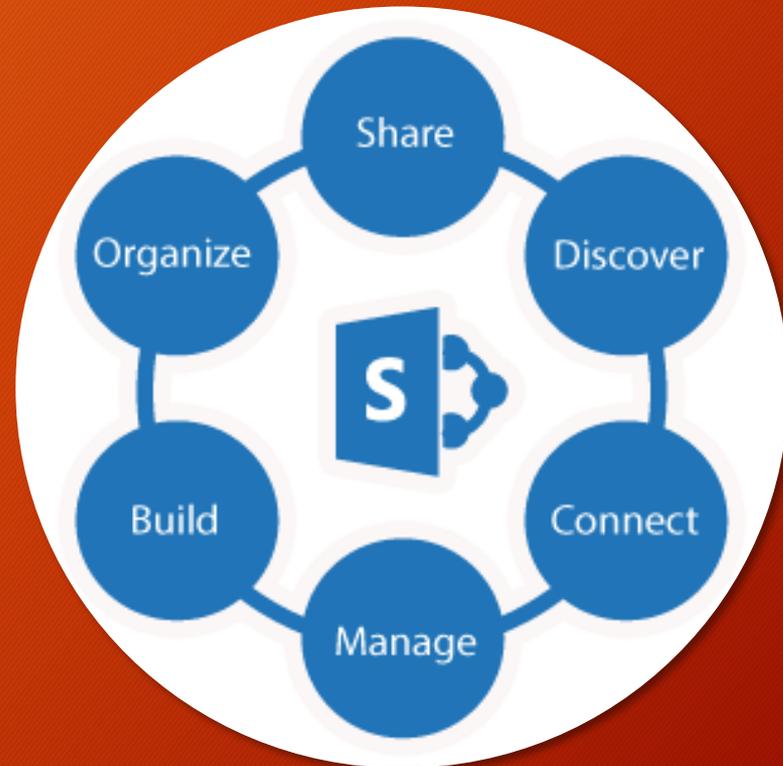
Pages

Lists

Libraries

Review

Review

- You've been hit with a lot of new information today, and it's easy to feel overwhelmed at something new.

- Let's review several of the summaries as the best "take-aways" from this training.
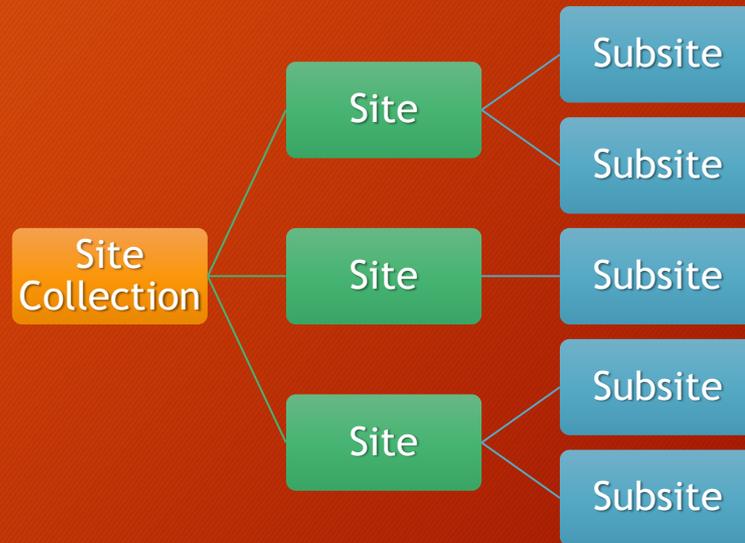
Review

UNDERSTANDING

- SharePoint Online is a highly customizable and flexible solution for managing documents, content, and information.

Review

STRUCTURE

- The basic building block of SharePoint is a site.

- A site should be organized around a common function, project, or team.

Review

NAVIGATION

- All SharePoint sites have four basic navigation elements, however, they may be hidden or customized by the site owner.

Breadcrumb trail

Top link bar

Quick launch menu

Site contents

Review

PAGES

- Pages display content.
- Most pages are made up of web parts.
- Web parts display dynamic content from sources such as lists and libraries.

Pages

Lists

Libraries

Review

LISTS

- Lists are information and data repositories.
- Lists do not store files.
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Pages

Lists

Libraries

Review

LIBRARIES

- Libraries are file repositories.
- Libraries are similar to Windows or network.
- Several methods to get files into library.
- Use of folders is discouraged.

Pages

Lists

Libraries

Additional Help

Training and Learning

- If you wish to learn more about SharePoint, its use and features, or view additional training resources, check out these sites.
  - EITS Training Site (internal DOE)
    - https://usdoe.sharepoint.com/sites/eitstraining/
  - Microsoft (external)
    - https://support.office.com/en-us/sharepoint

Issues and Support

- If you have a technical problem with SharePoint (i.e. can't access, not working, need a new site, etc.) please create a service request in DAYS or contact the Service Desk.
  - DAYS
    - https://doeprod.service-now.com/
  - Service Desk
    - 301.903.2500

Thank you!