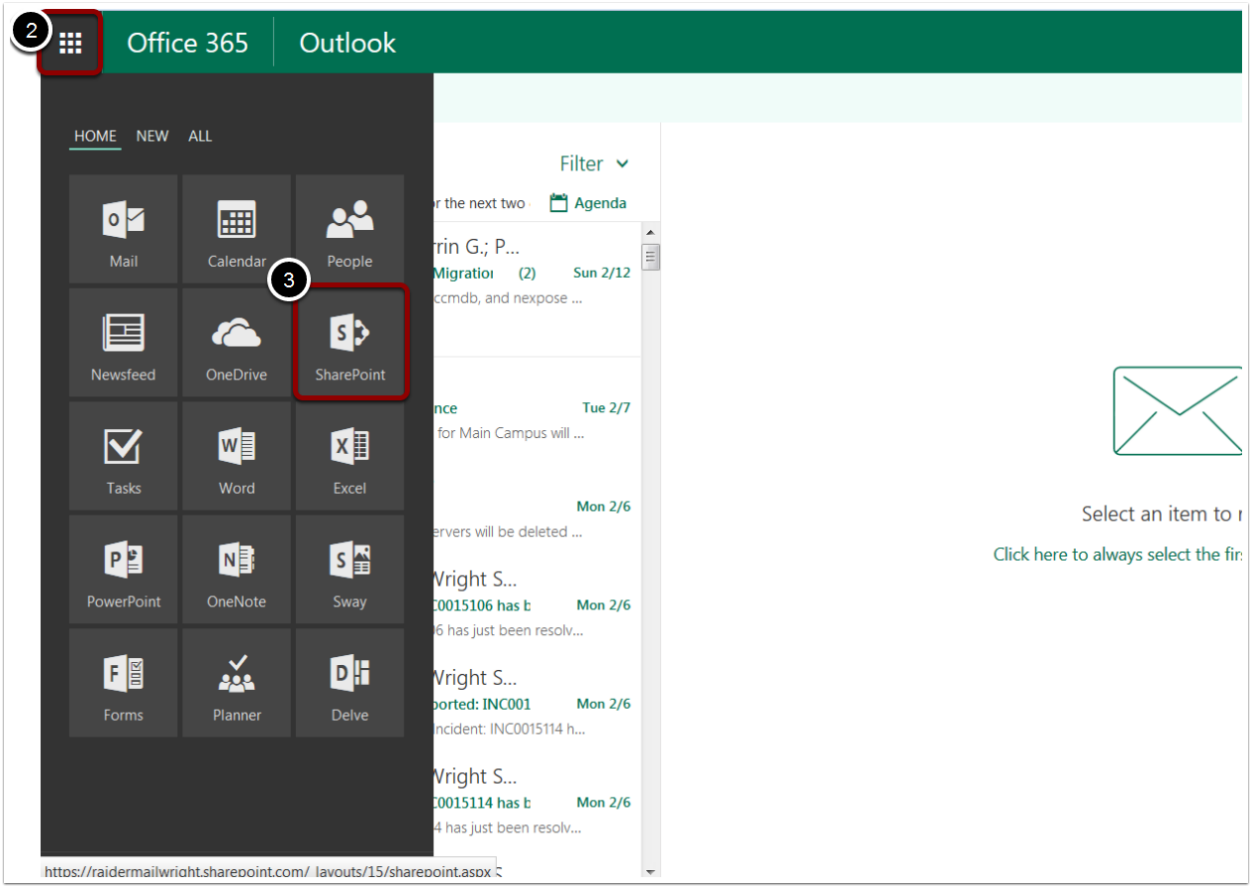
# SharePoint Online Basics Training

*SharePoint is a portal that helps facilitate, communicate, and store common documents for better productivity.*

## Accessing SharePoint

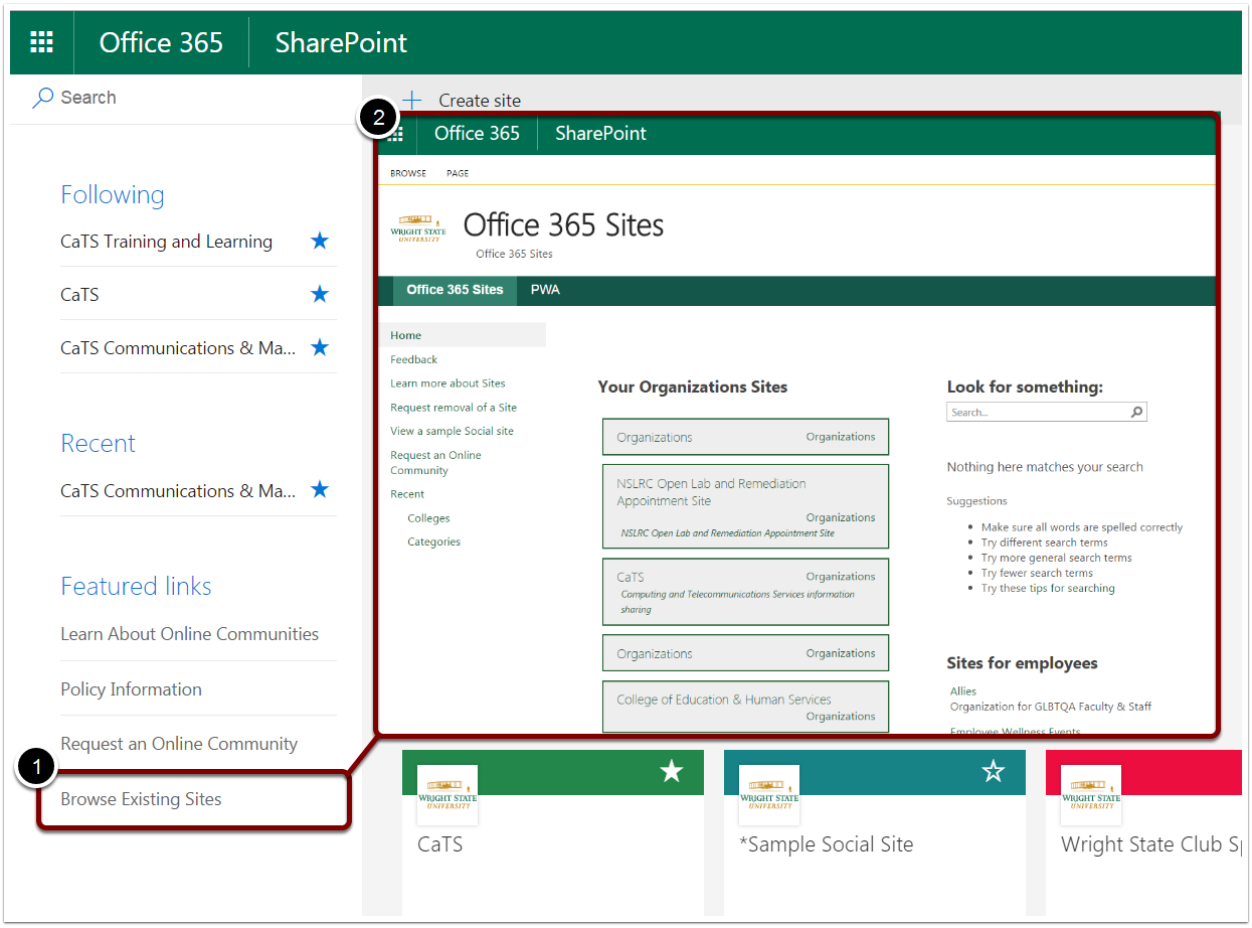
1. Login to your Office 365 Account.
2. Click the **grid icon**.
3. Click **SharePoint**.



# Browsing Sites

1. Click **Browse Existing Sites**.

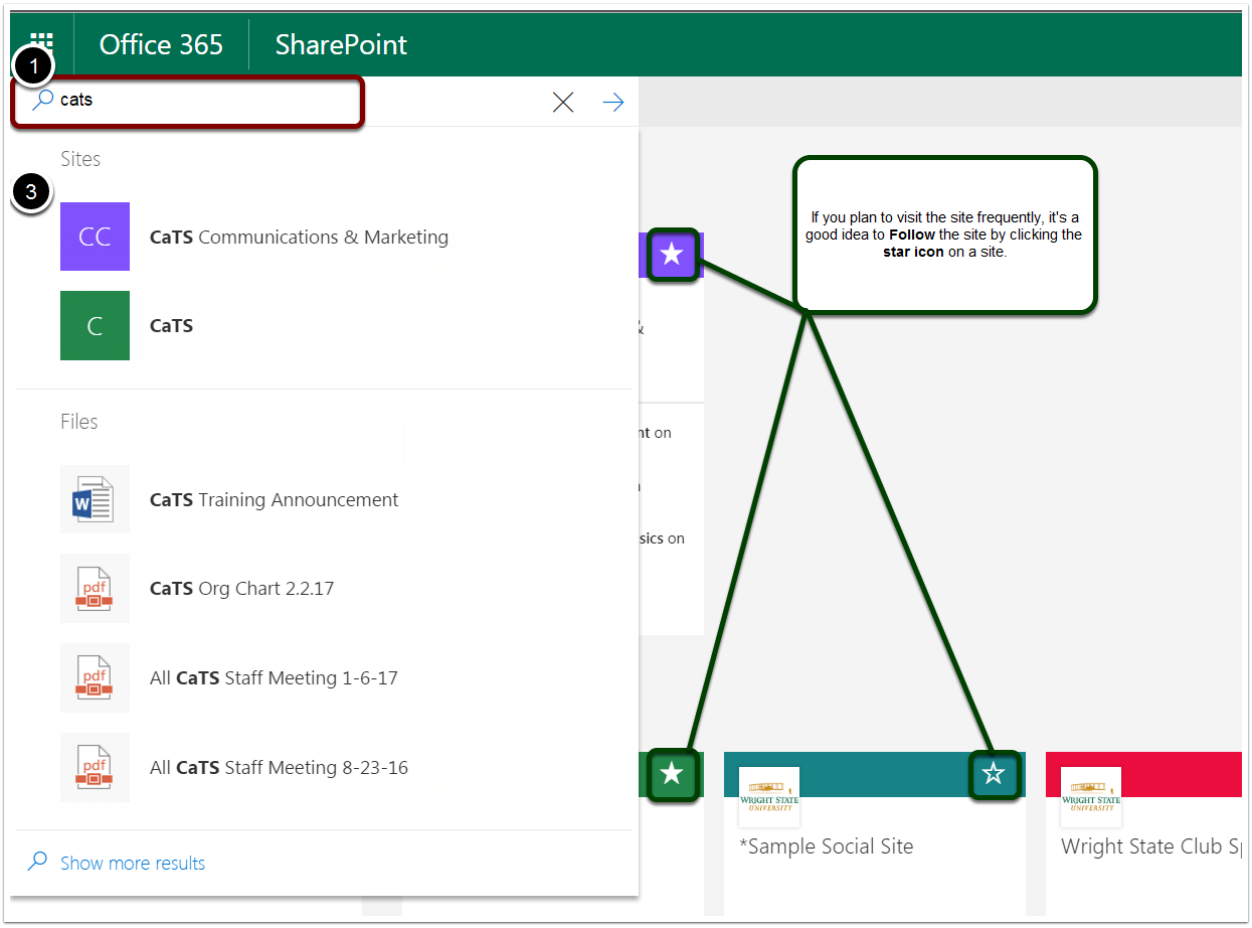
2. A new window will appear with a list of public sites you can view and follow.



# Searching for a Site

1. Click in the **Search engine**.
2. Search for the site you would like to visit.
3. Click the site once it comes up, or hit **Enter** once you have finished typing. The site will then open in a new tab.

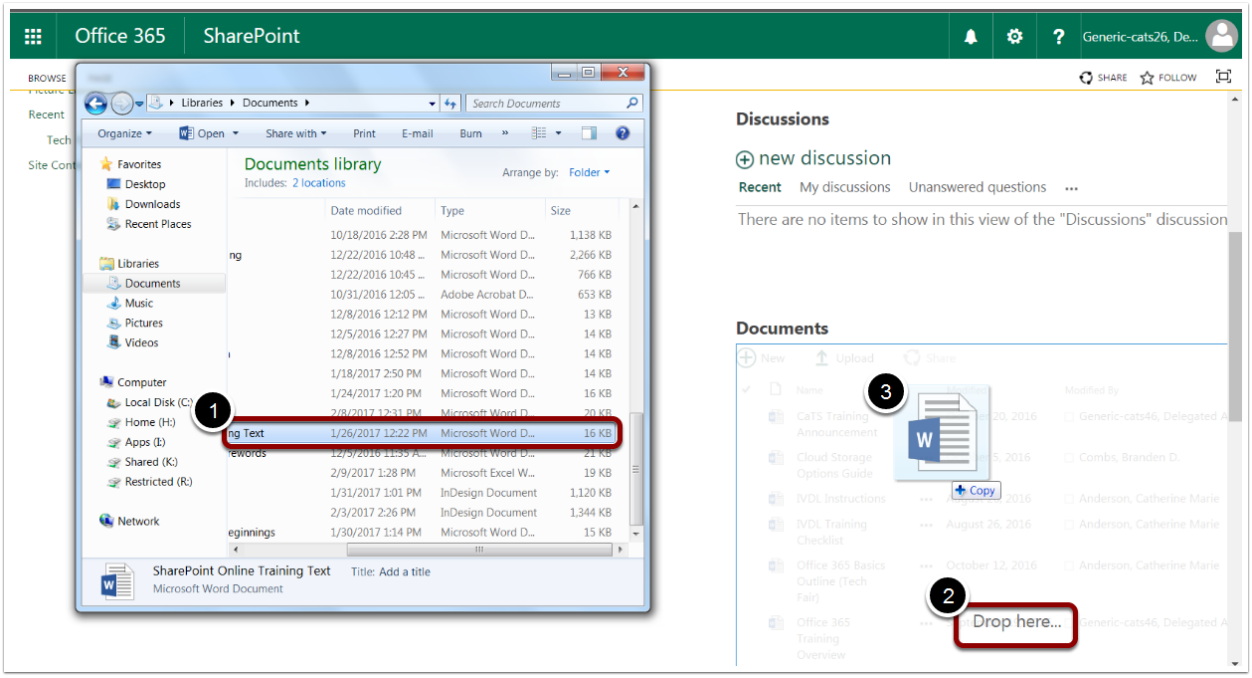
**Note** If you search the name of a site you know exists and it doesn't appear in the options, try clicking the **Show more results icon** at the bottom.



# Using the Drag and Drop Feature

1. Select the file you would like to add to your SharePoint Site.
2. Drag the file to document library until it reads, “Drop here...”
3. Drop the file.

**Note** You can also move the file from one folder to another within the same site using the same steps.



# Document Library

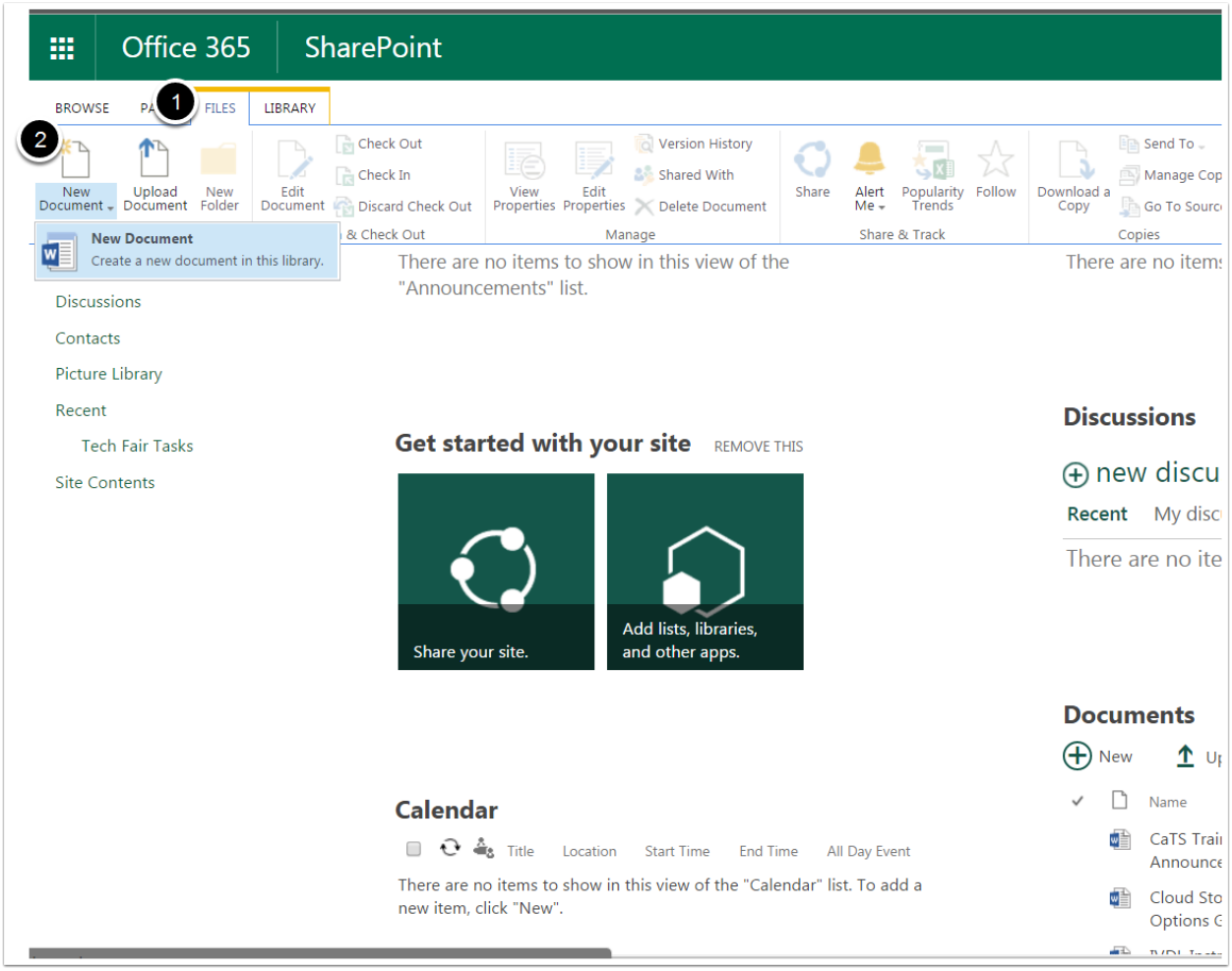
## Creating a New Document in a Library

1. Click **Files**.

2. Click **New Document**.

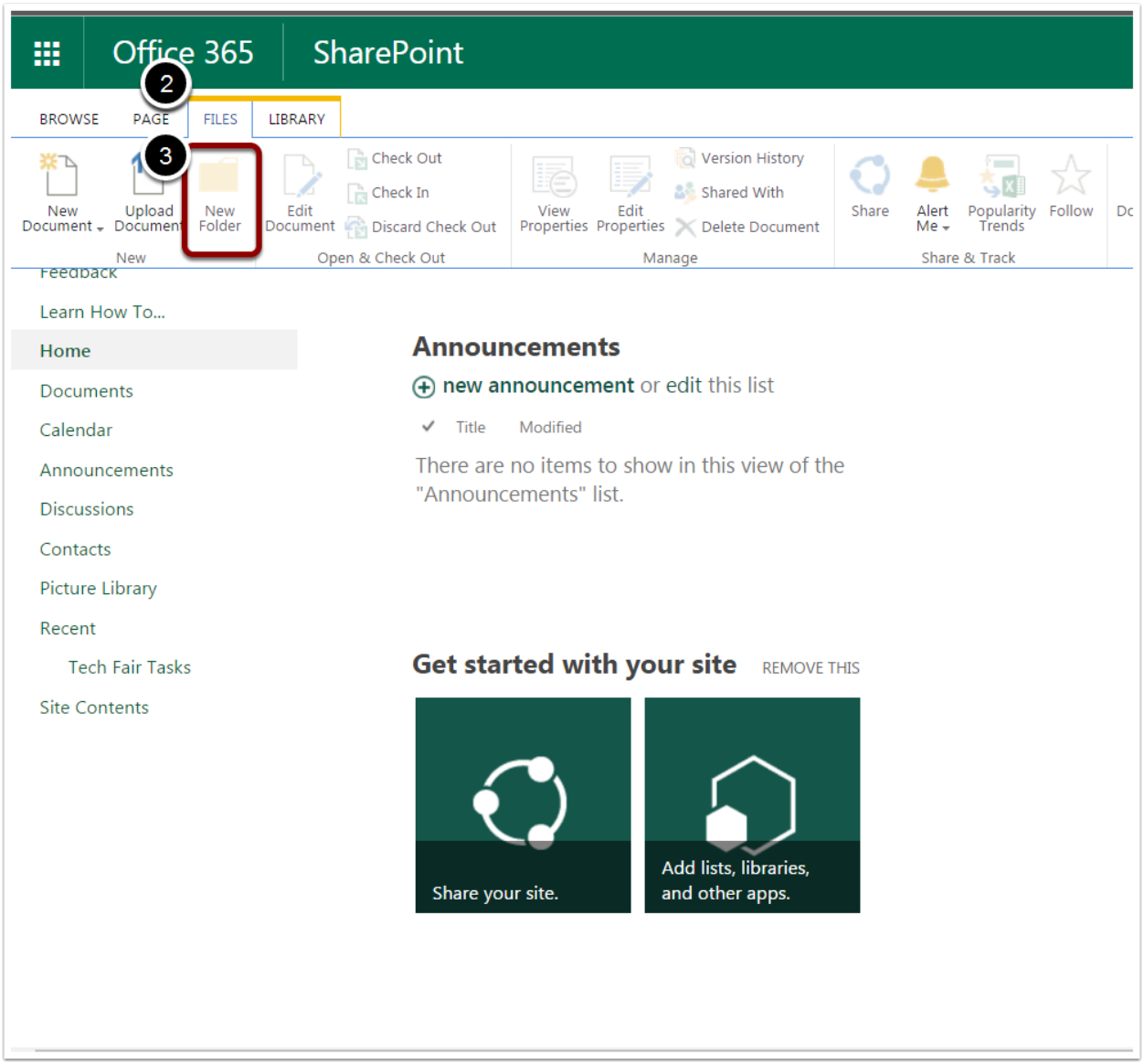
A Word Document will open up in a new tab.

***Note*** Be sure to save your document by going to **File > Save As**



# Creating a New Folder

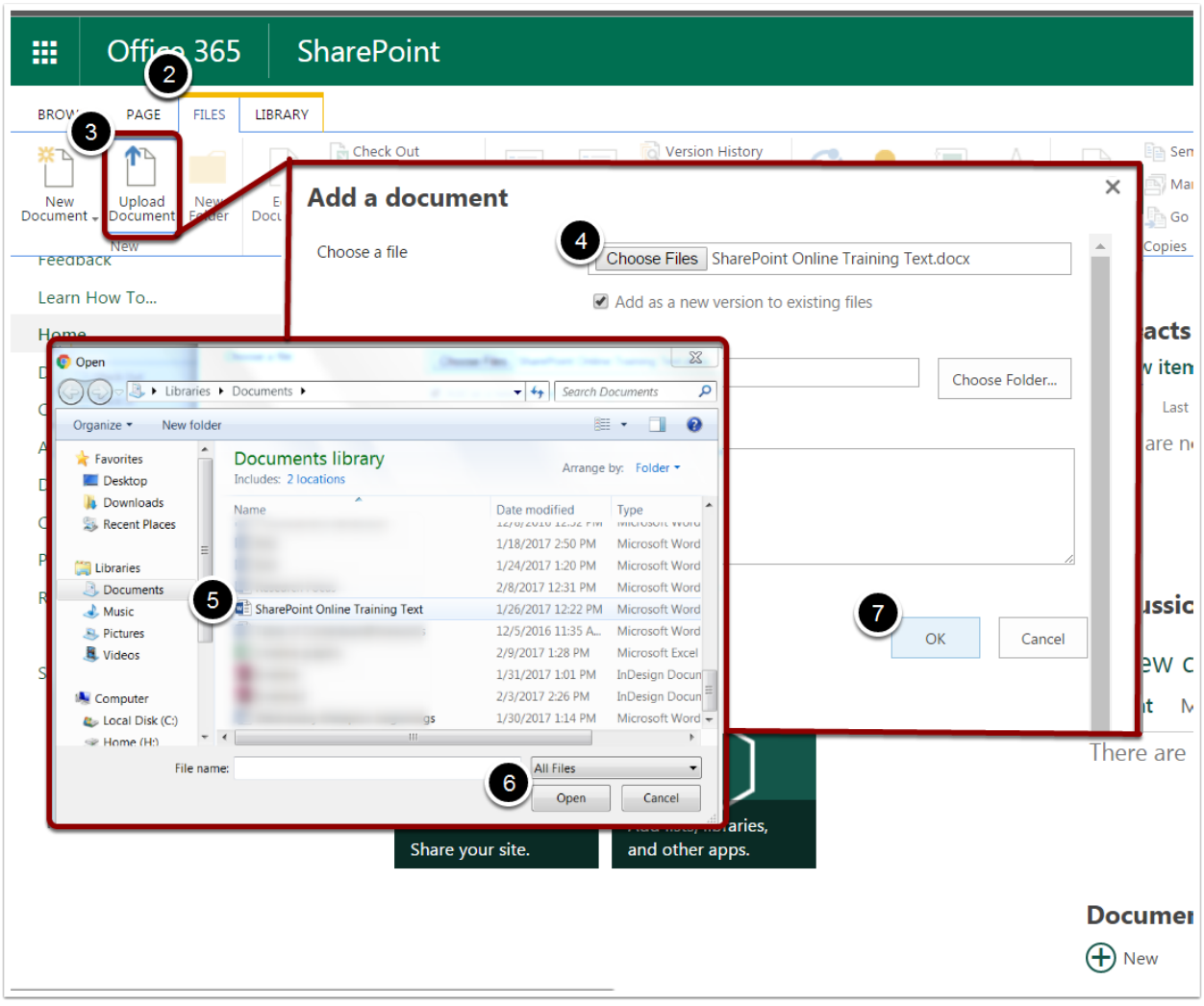
1. Select the document library in which you would like to place the new folder.
2. Click **Files**.
3. Click **New Folder**.
4. In the textbox provided, name your folder.
5. Click **Save**.



# Uploading a Single File

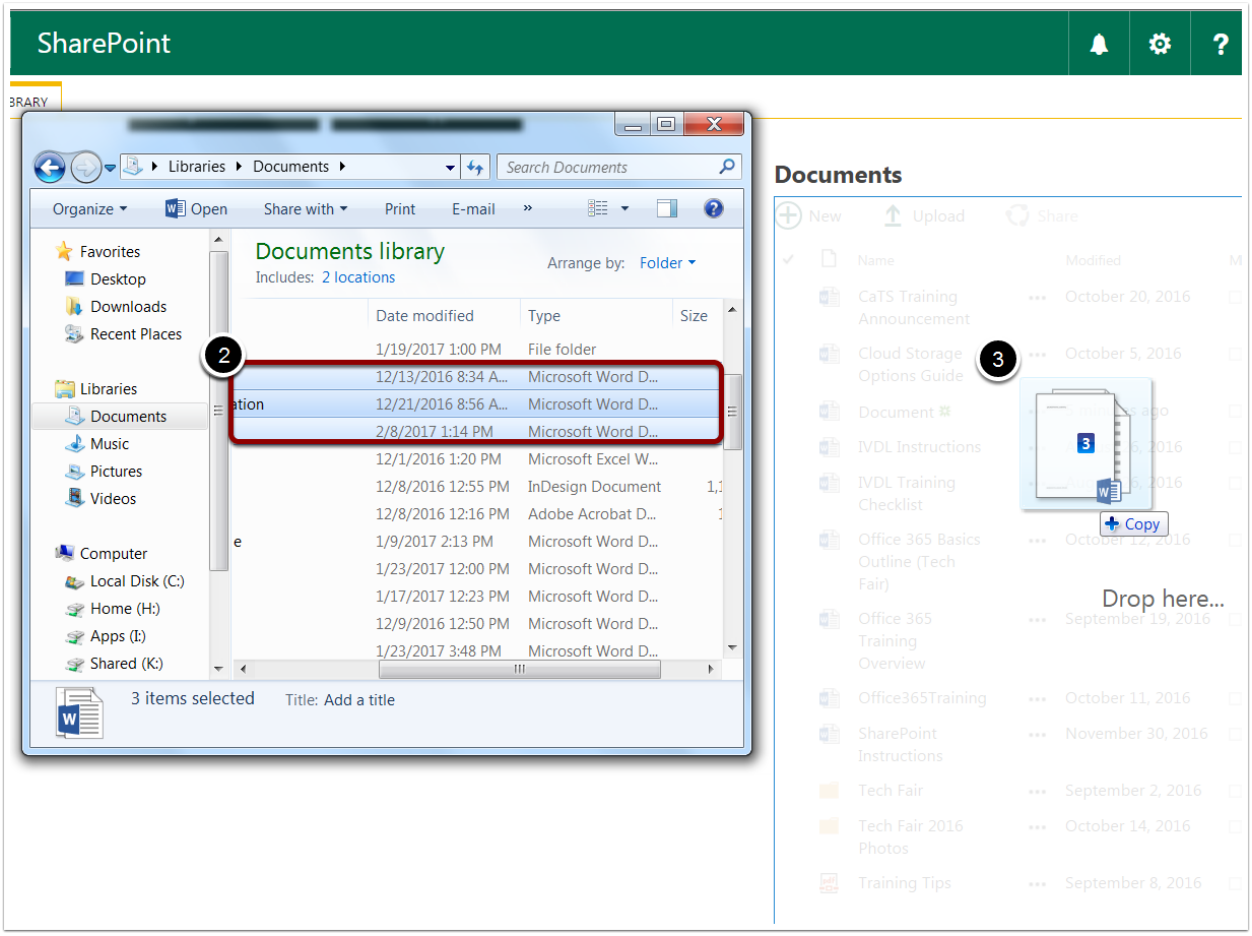
1. Select the document library in which you would like to upload the new file.
2. Click **Files**.
3. Click **Upload Document**.
4. Click **Choose Files**.
5. Select the file you would like to upload.
6. Click **Open**.
7. Click **OK**.

Alternatively, you can click **New Document File**, or use the Drag and Drop method outlined previously.



# Uploading Multiple Files

1. Select the document library in which you would like to upload the new files.
2. Using the **control key**, select the multiple files you would like to upload.
3. Use the Drag and Drop method outlined previously.

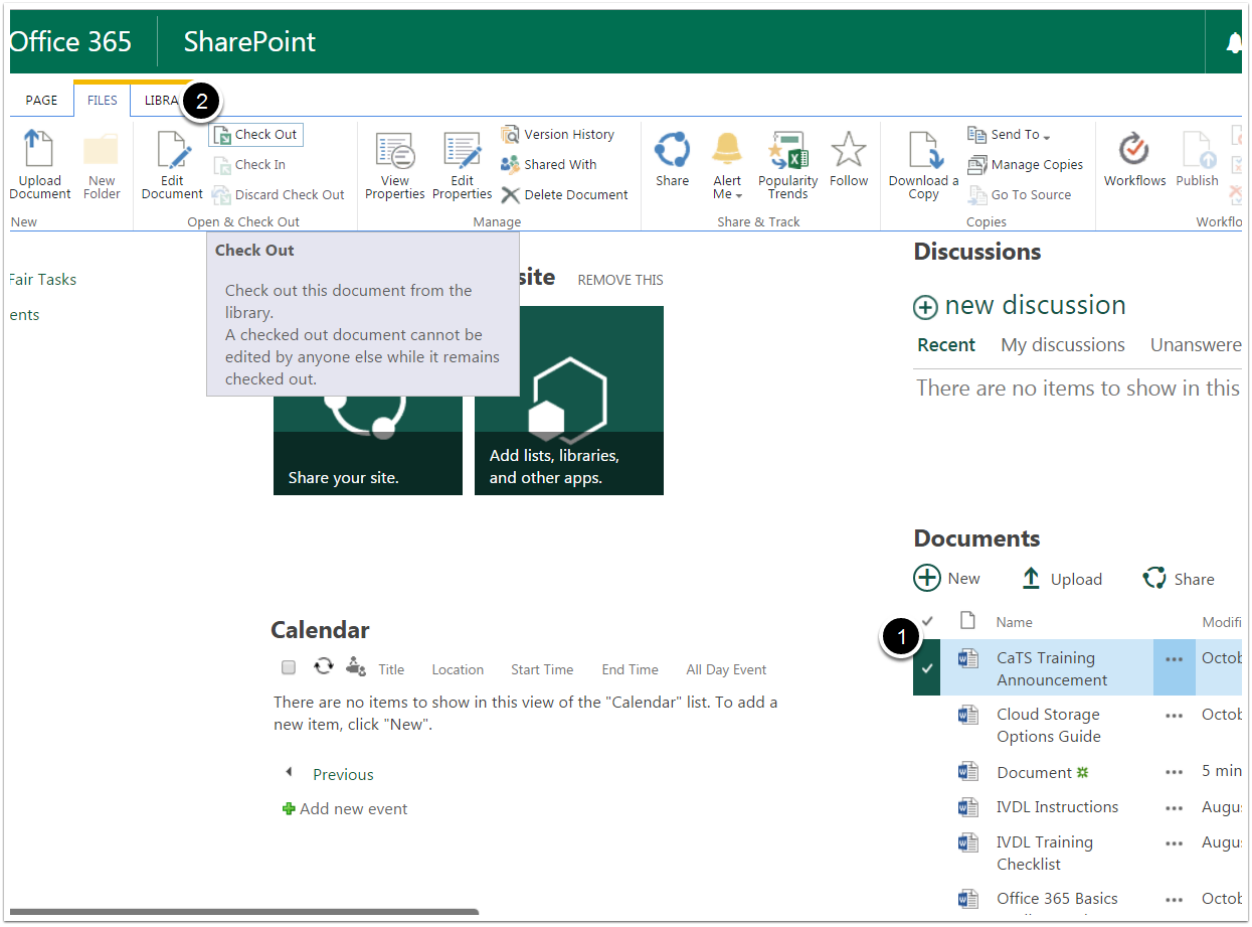


# Checking Out a File

1. Select the file you would like to check out.
2. Click **Check Out**.

Alternatively, you can click the **three dots** next to the file > Click **Check Out**.

***Note*** When a document is checked out, only the one who checked it out can work on it.

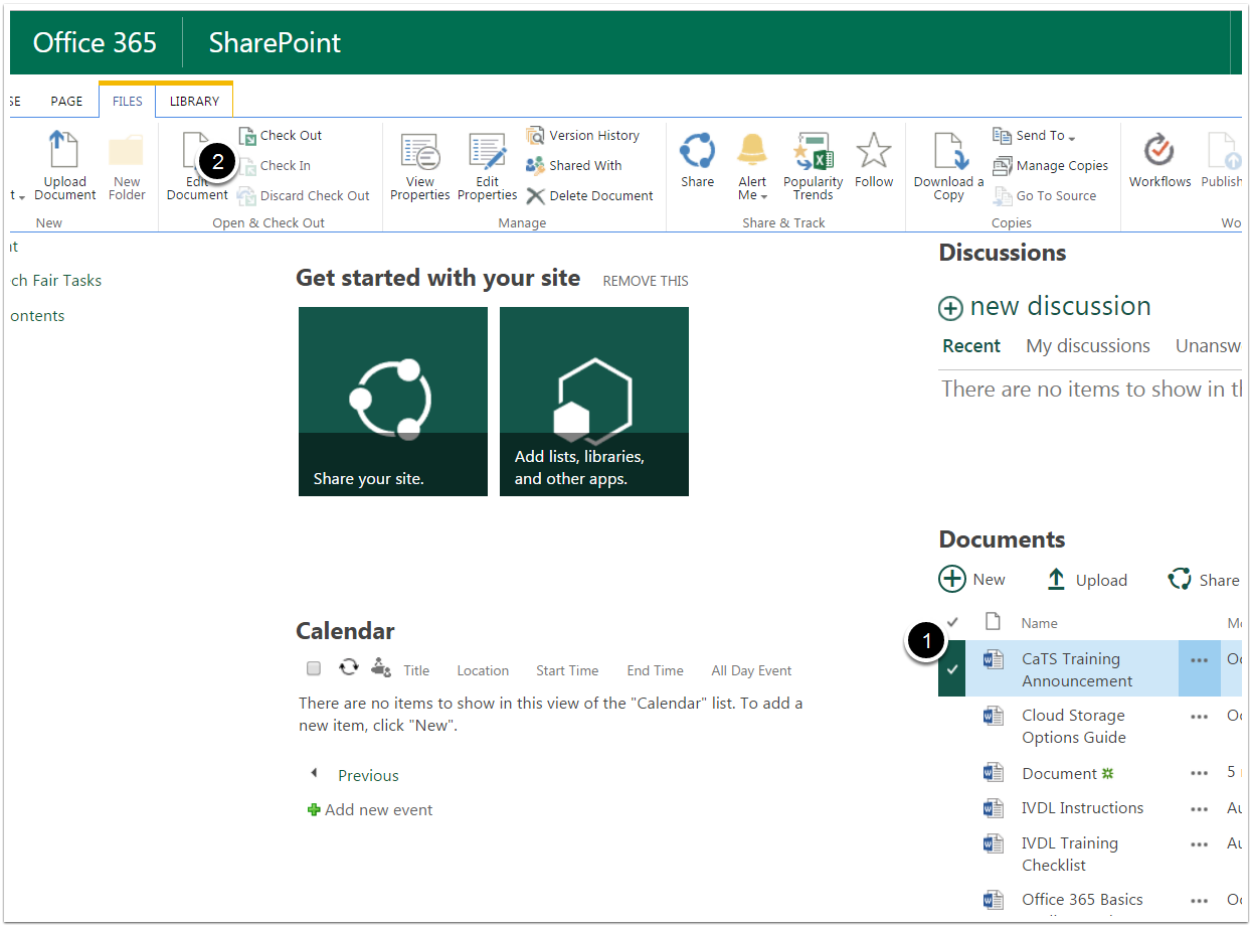


# Checking In a File

1. Select the file you would like to check in.

2. Click **Check In**.

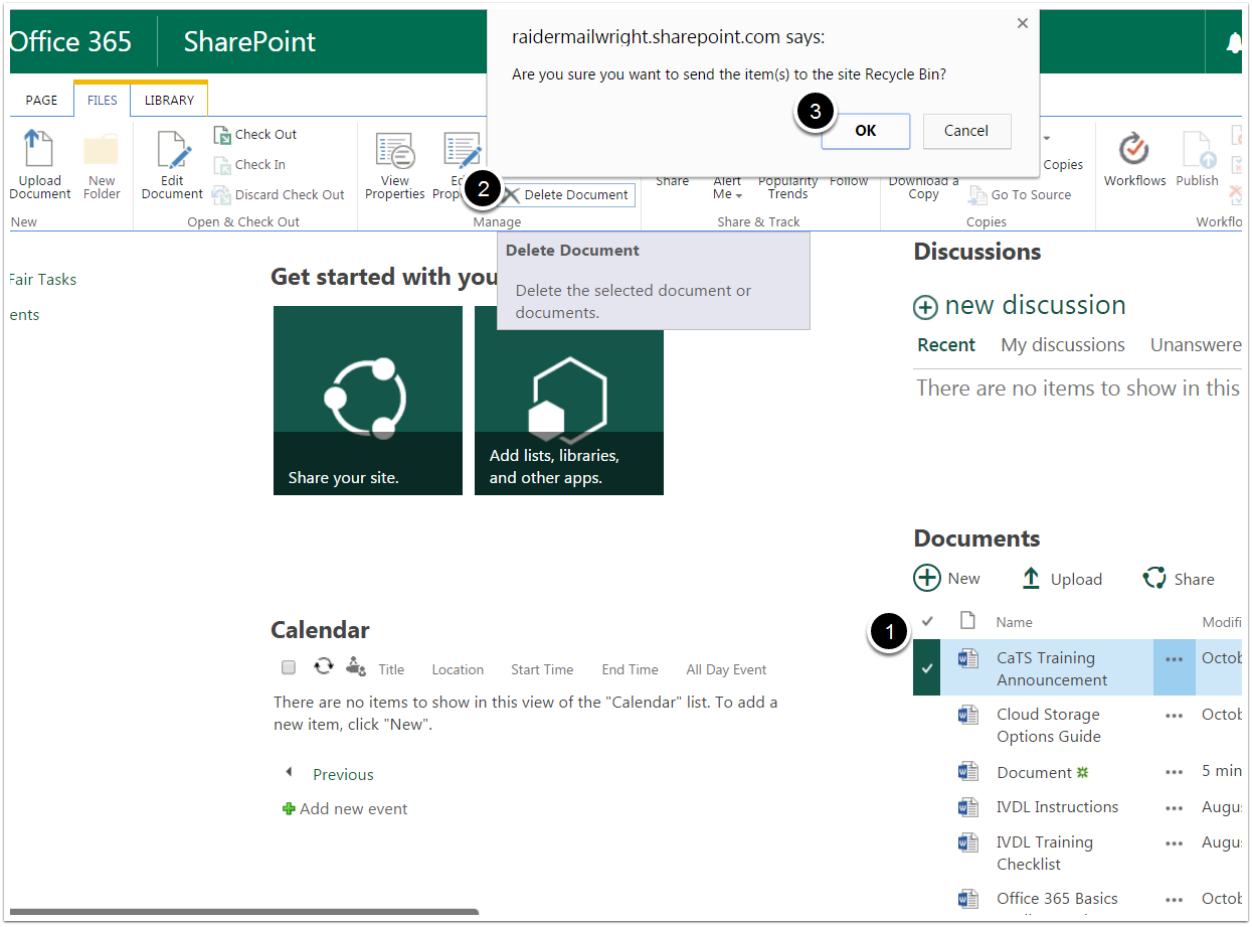
Alternatively, you can click the **three dots** next to the file > Click **Check In** > Click **No** to ensure the file does not check out after you close out of it.



# Deleting a File

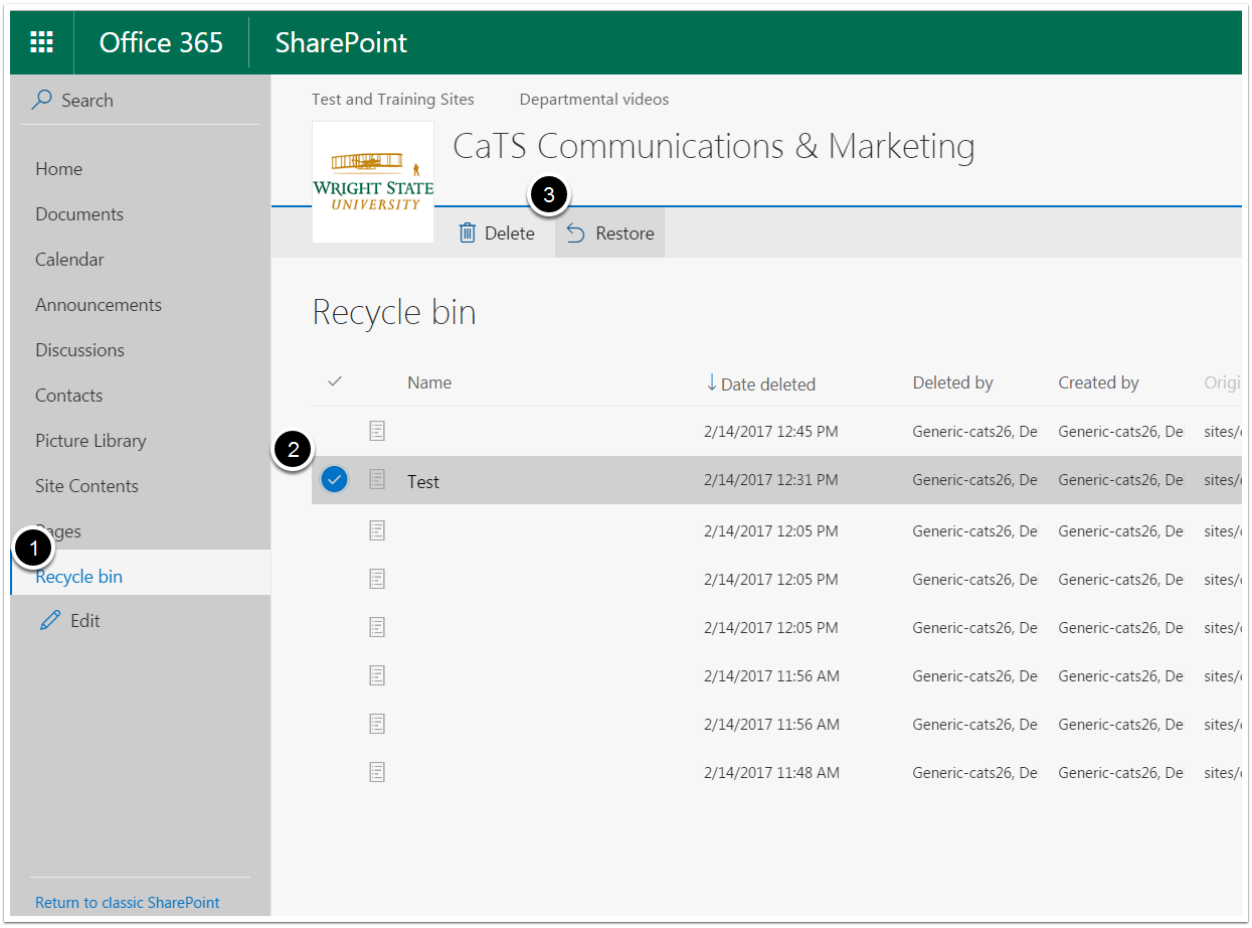
1. Select the file you would like to delete.
2. Click **Delete Document**.
3. Click **Okay**.

Alternatively, you can click the **three dots** next to the file > Click **Delete** > Click **Okay**



# Recovering a File

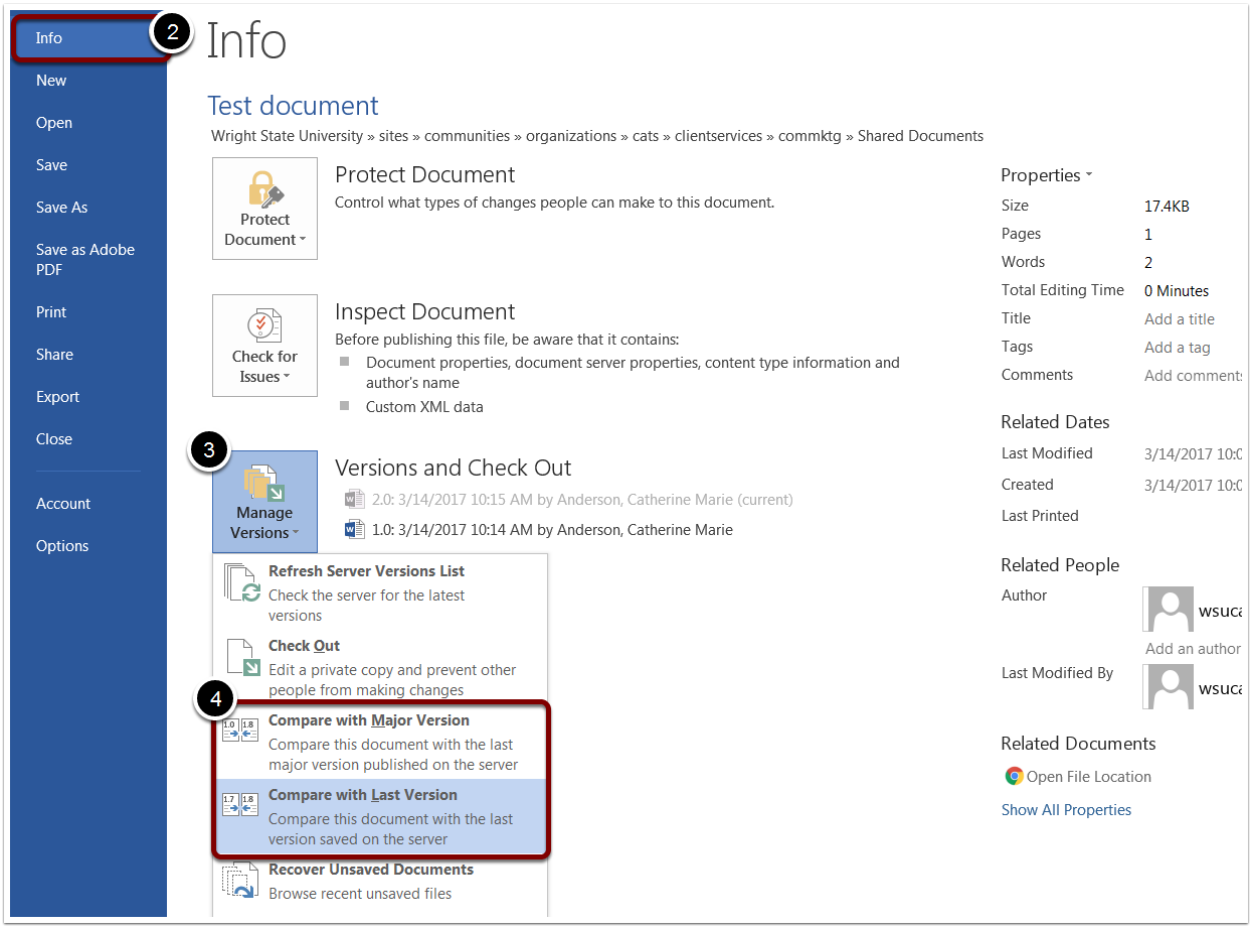
1. Click **Recylce Bin**.
2. Select the file you would like to recover.
3. Click **Restore**.



# Comparing Versions of a Word Document

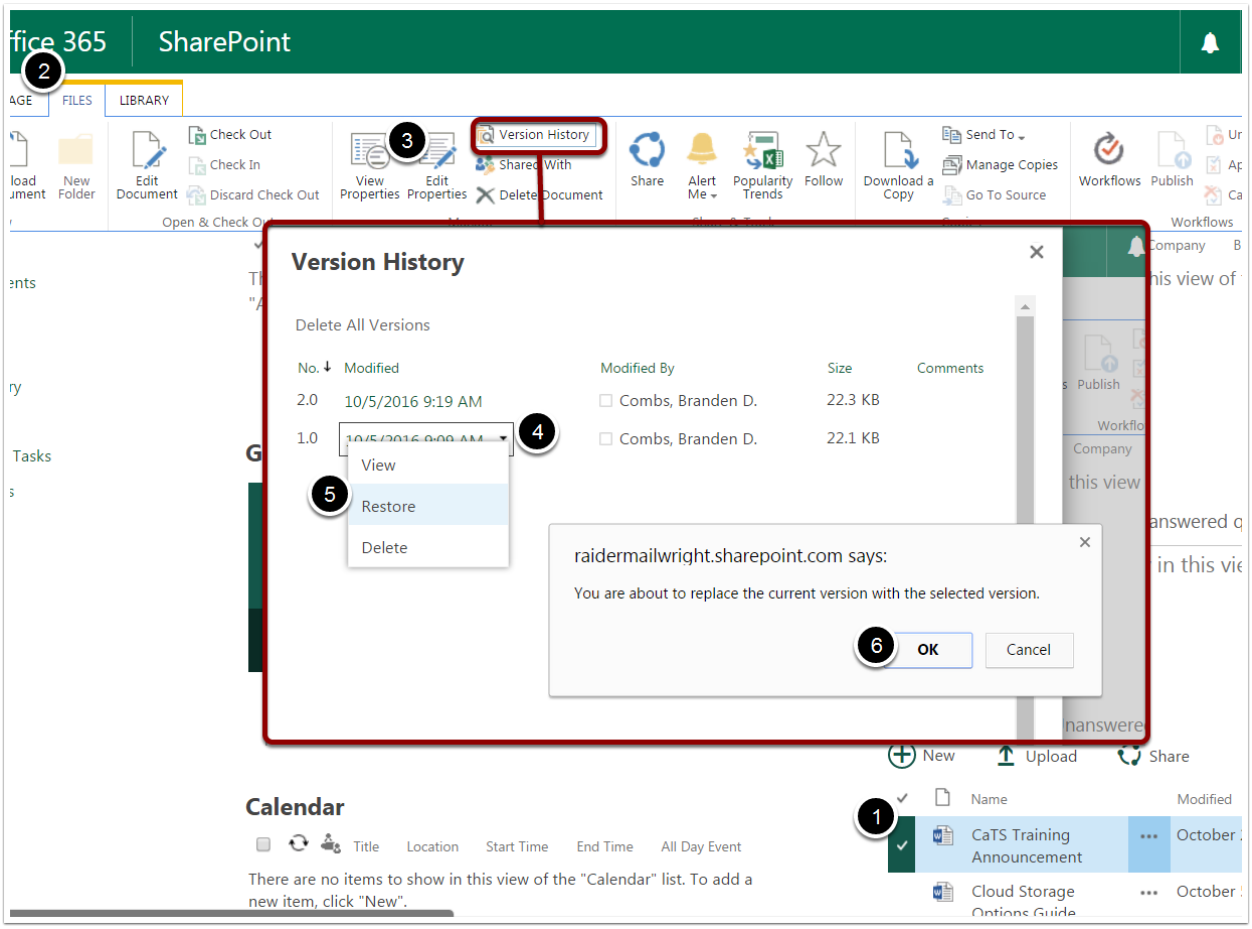
1. In the document, click the **Files tab**.
2. Click **Info**.
3. Click **Manage Versions**.
4. Select to either compare the document with the **Major Version** or the **Latest Version**. The selected version will then appear alongside the current version you are working on.

Alternatively, while in the document, you can click the **Review tab** > Click **Compare**



# Restoring a Previous Version of a File

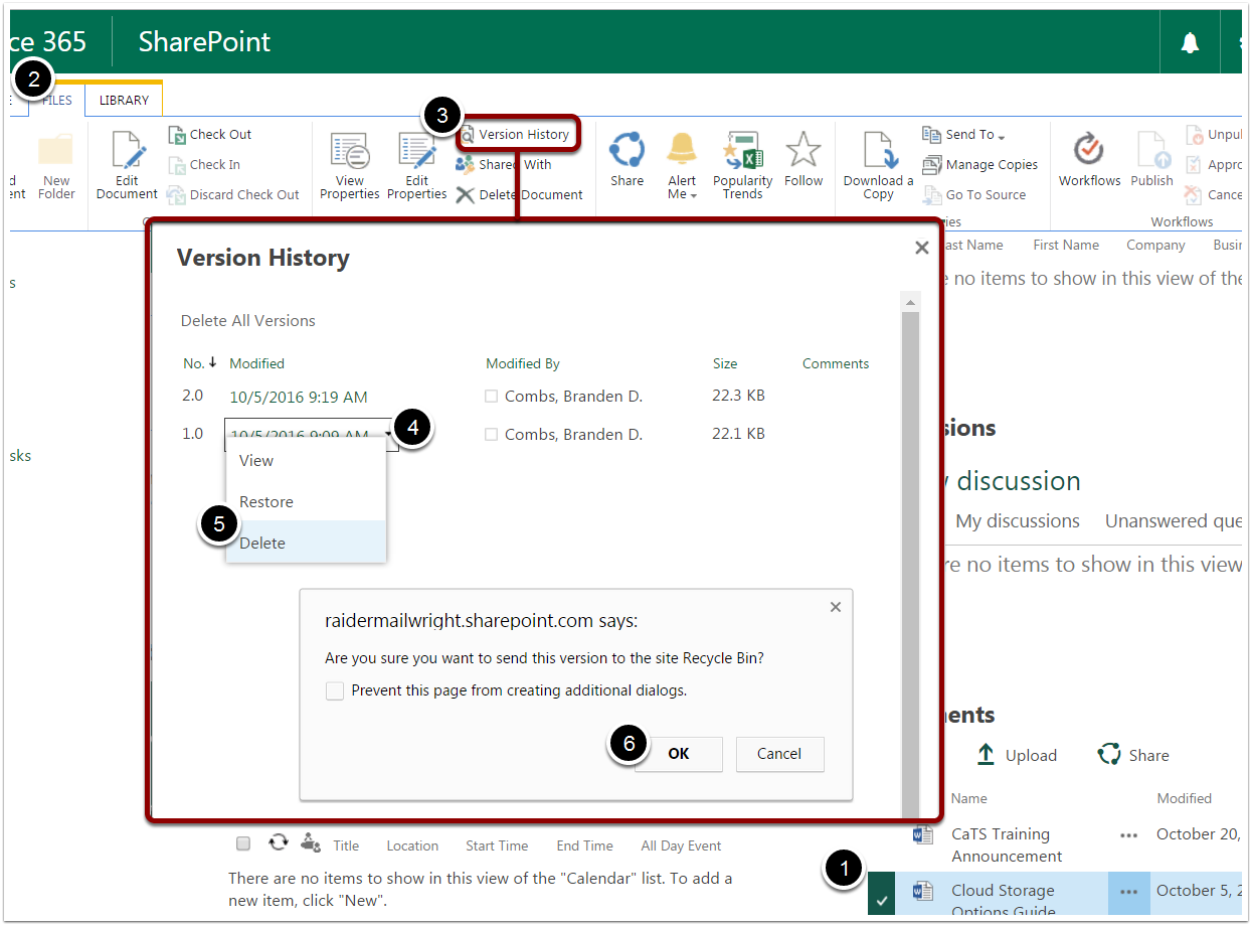
1. In the Document Library, click the **File tab**.
2. Click **Version History**.
3. Select the version you wish to restore.
4. Click the **Drop-down List**.
5. Click **Restore**.
6. Click **OK**.



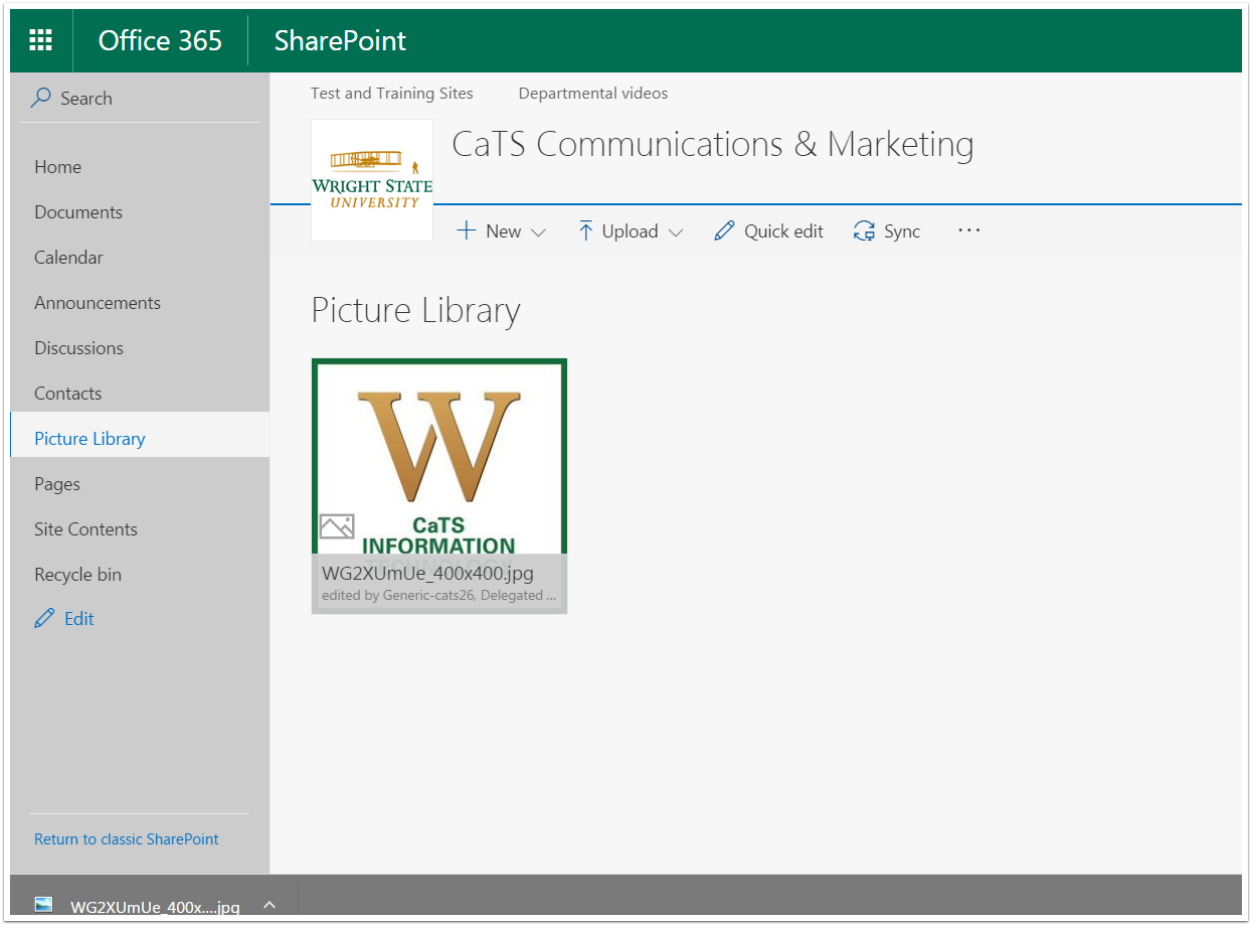
# Deleting a Version of the File

1. In the Document Library, click the **File tab**.
2. Click **Version History**.
3. Select the version you would like to delete.
4. Click the **Drop-down List**.
5. Click **Delete**.
6. Click **OK**.

***Note*** You can also click **Delete All Versions** or **Delete Minor Versions** in the **Version History** menu.



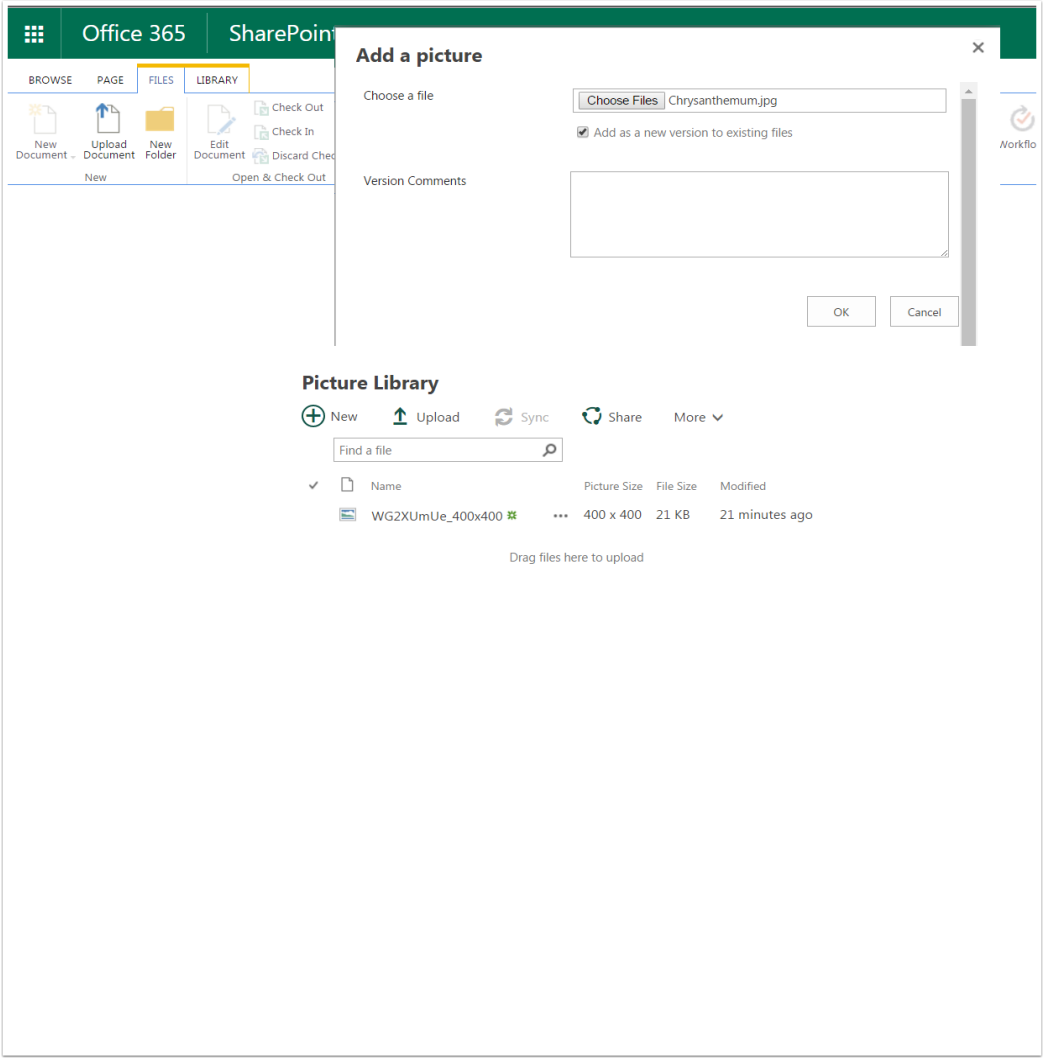
# Picture Library



# Uploading a Single Picture

1. Select the Picture Library in which you would like to upload the picture.
2. Click the **Files tab**.
3. Click **Upload Document**.
4. Click **Browse**.
5. Select the picture you would like to upload.
6. Click **OK**.
7. In the textboxes provided, name and describe your picture. (Optional)

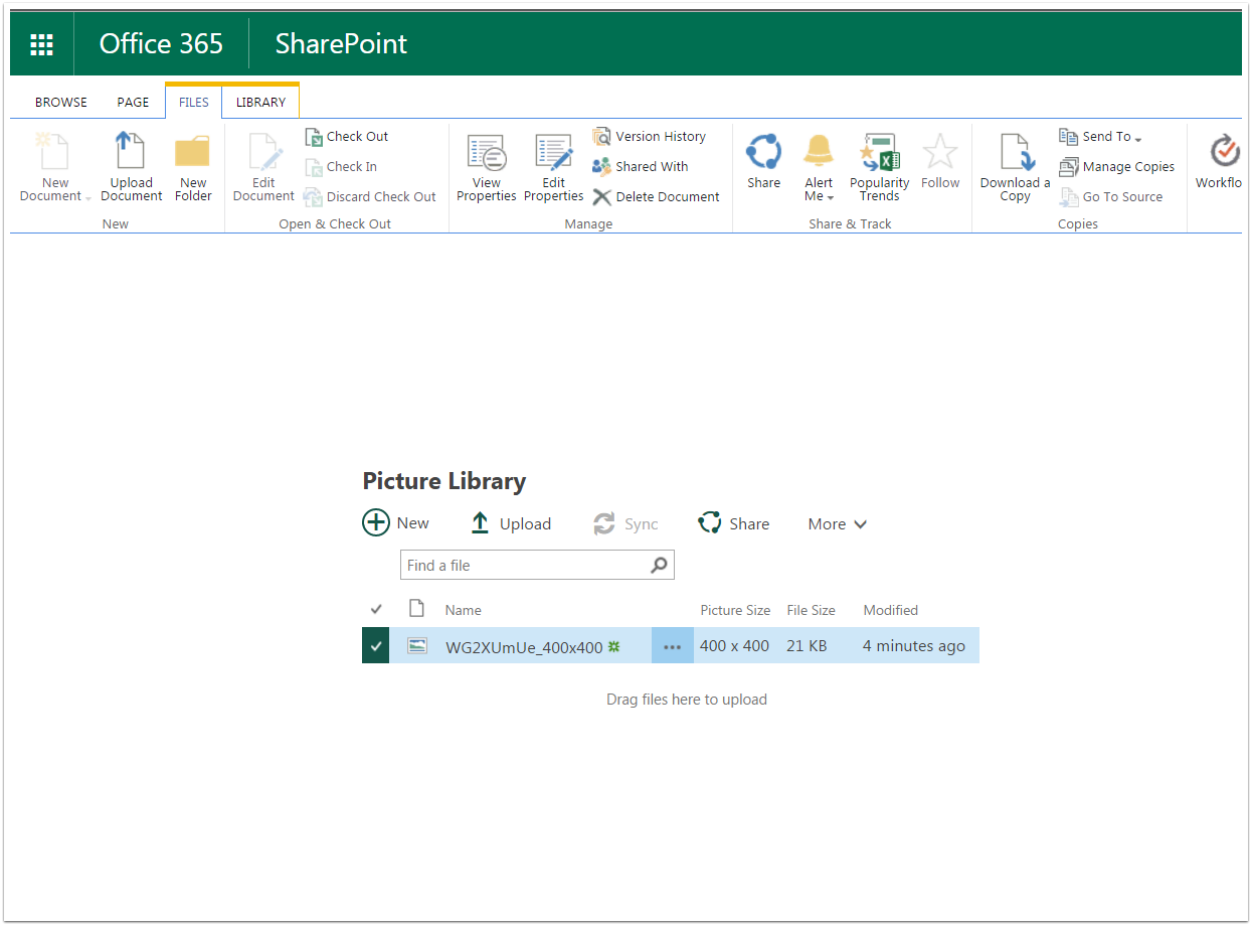
Alternatively, you can click **New Picture**, **Upload,** or use the Drag and Drop method.



# Uploading Multiple Pictures

1. Select the Picture Library in which you would like to upload the picture.
2. Using the **control** key, click the pictures you would like to upload.
3. Use the Drag and Drop method.

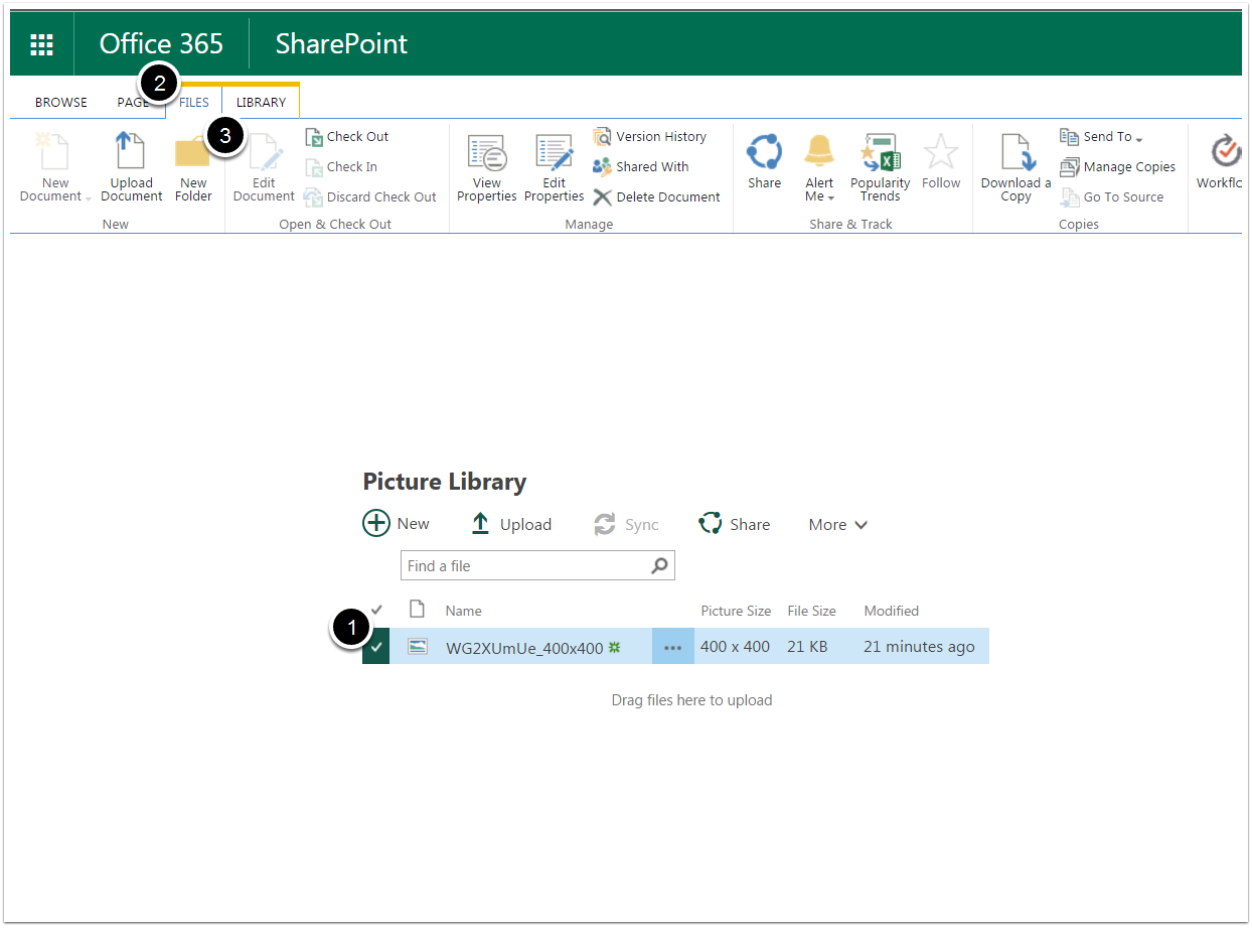
Alternatively, you can click **New Picture** > Click **Browse** > Open the folder the pictures are in > Select the pictures > Use the Drag and Drop method.



# Editing a Picture

1. Select the picture you would like to edit.
2. Click the **Files tab**.
3. Click **Edit Document**.
4. The picture will appear in your device's photo editor (e.g. Paint, Windows Photo).
5. When you have finished editing your picture, click **Save**.

Alternatively, you can click the **three dots** next to the picture file > Click **Edit**

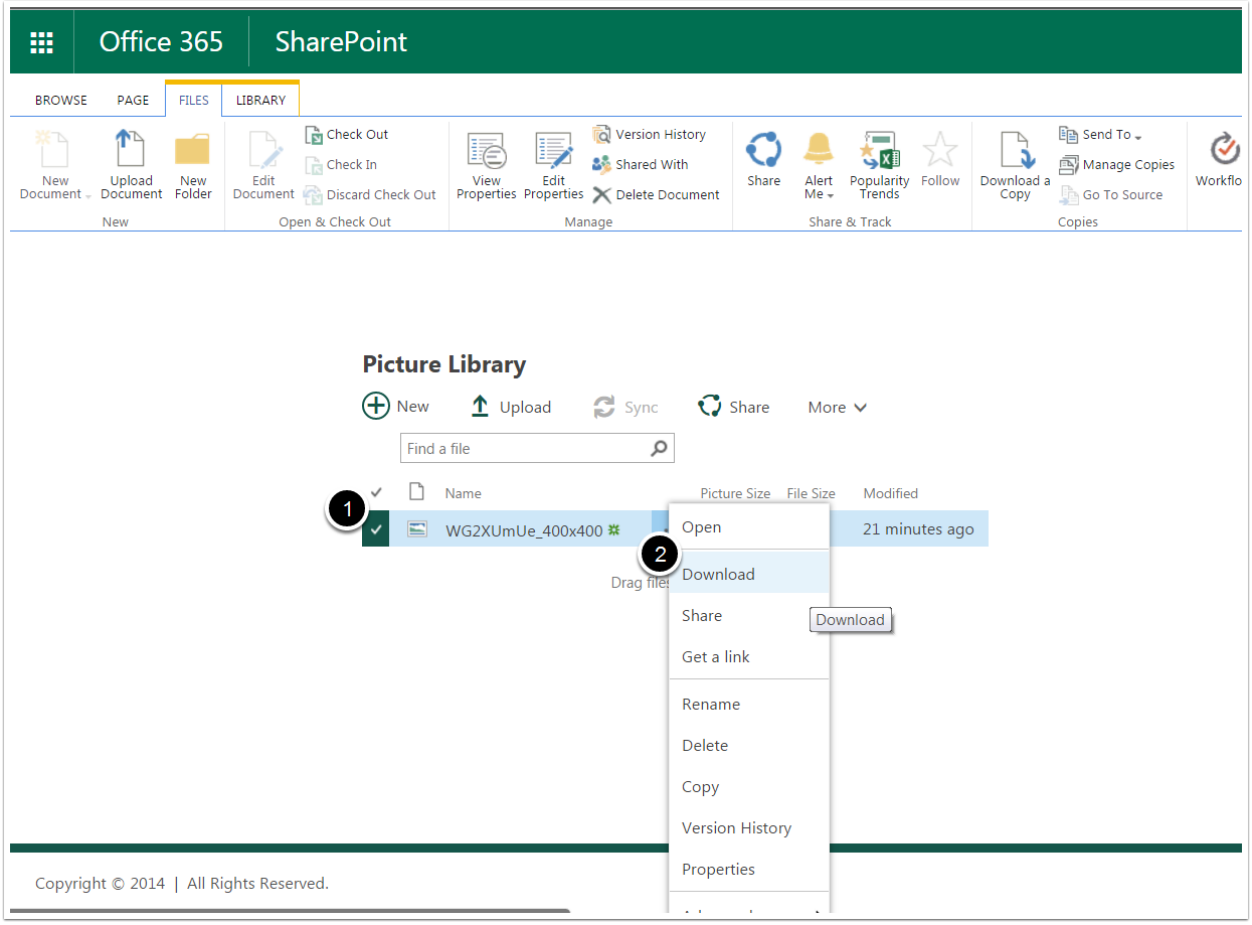


# Downloading a Picture

1. Right click the picture you would like to download.

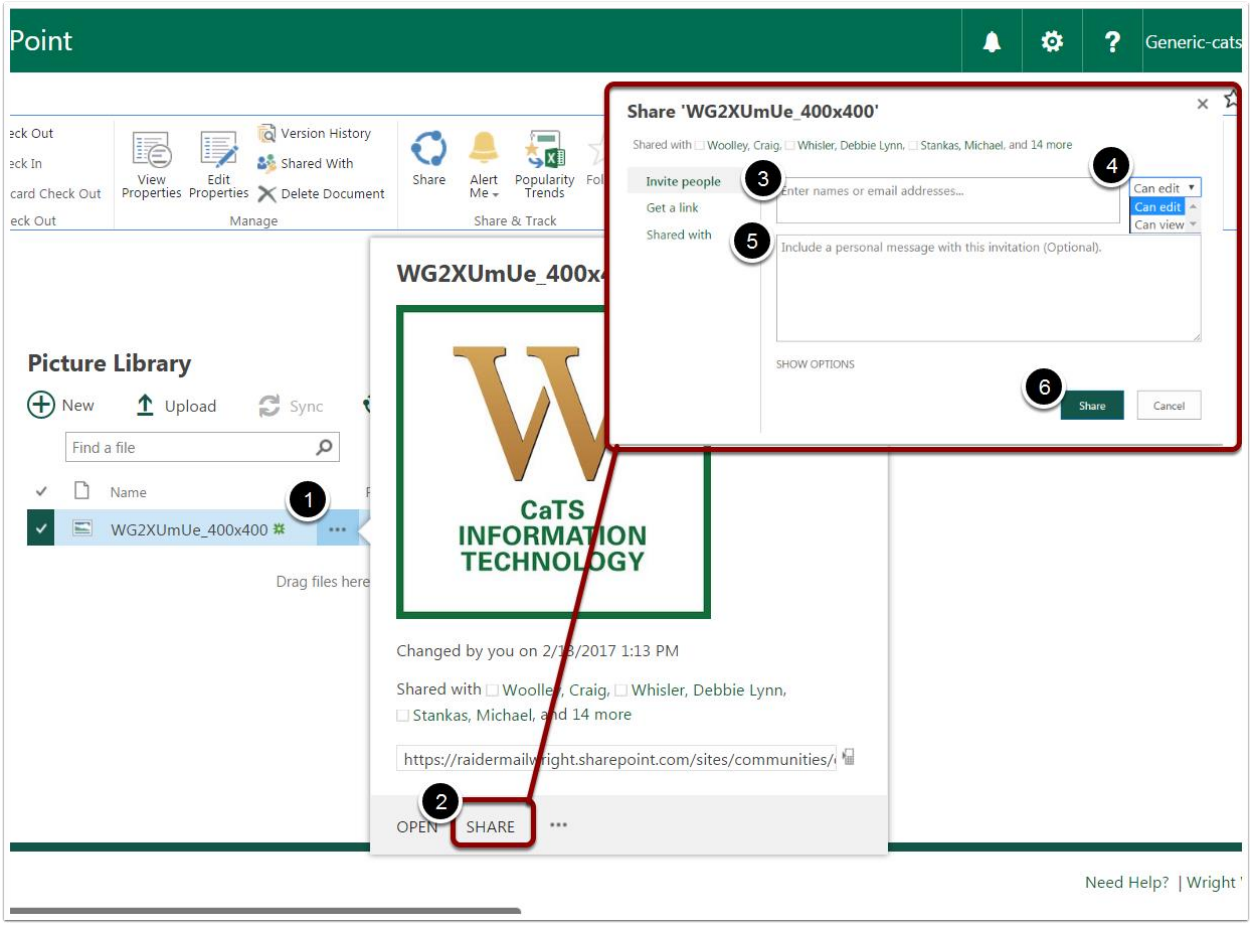
2. Click **Download**.

Alternatively, you can select the picture you would like to download > Click the **File tab** > Click **Download a Copy**



# Sharing a Picture

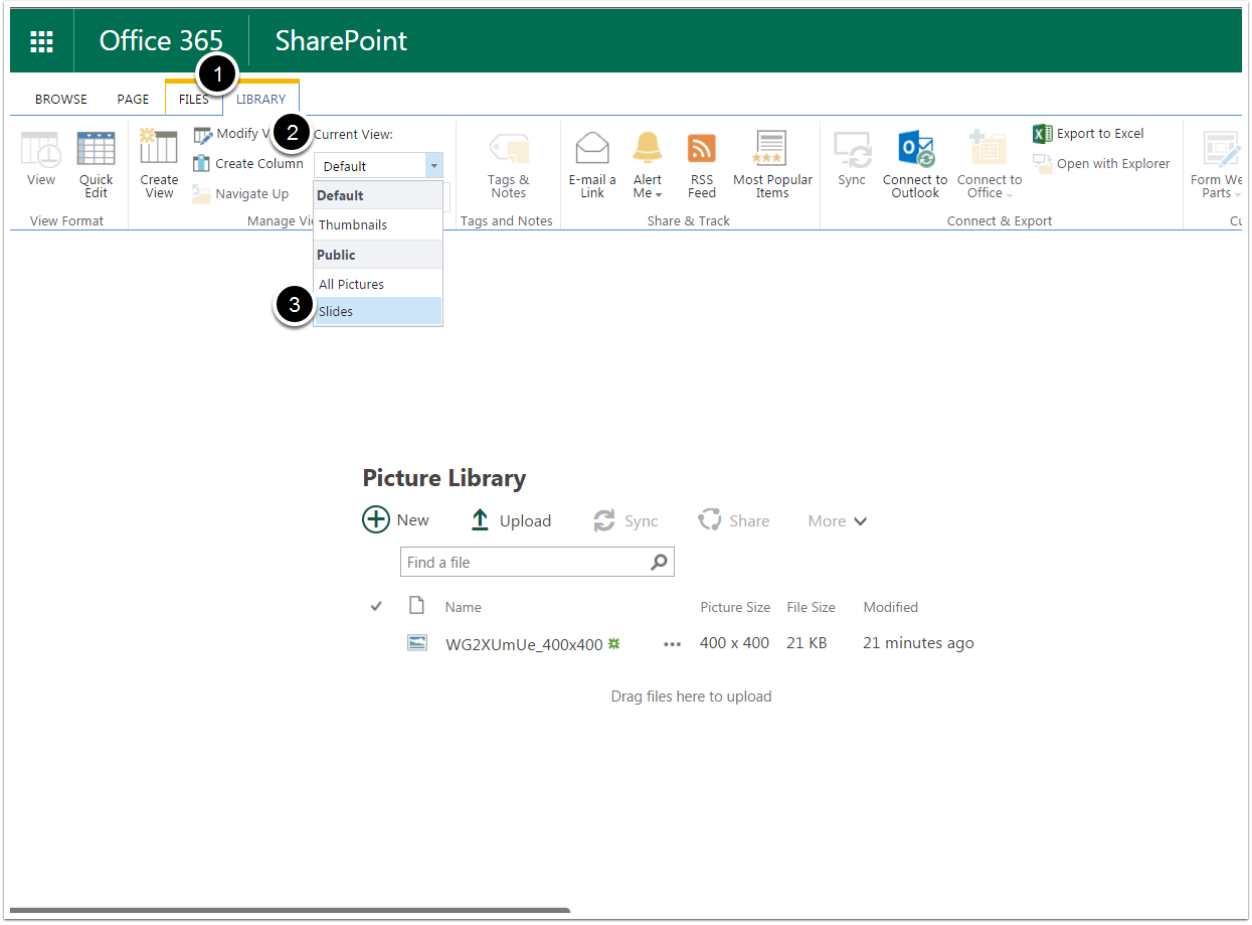
1. Click the **three dots** next to the picture you would like to share.
2. Click **Share**.
3. In the textbox provided, type the email address of the recipient(s) you wish to share the picture with.
4. Under the drop-down menu, select whether your recipient(s) can only edit or view the image.
5. In the textbox provided, include a message to your recipient(s). (Optional)
6. Click **Share**.



# Viewing a Slideshow

1. Click the **Library tab**.
2. Click **Current View**.
3. Under the drop-down menu, click **Slides**.
4. Use the **arrow icon** to navigate through the pictures.

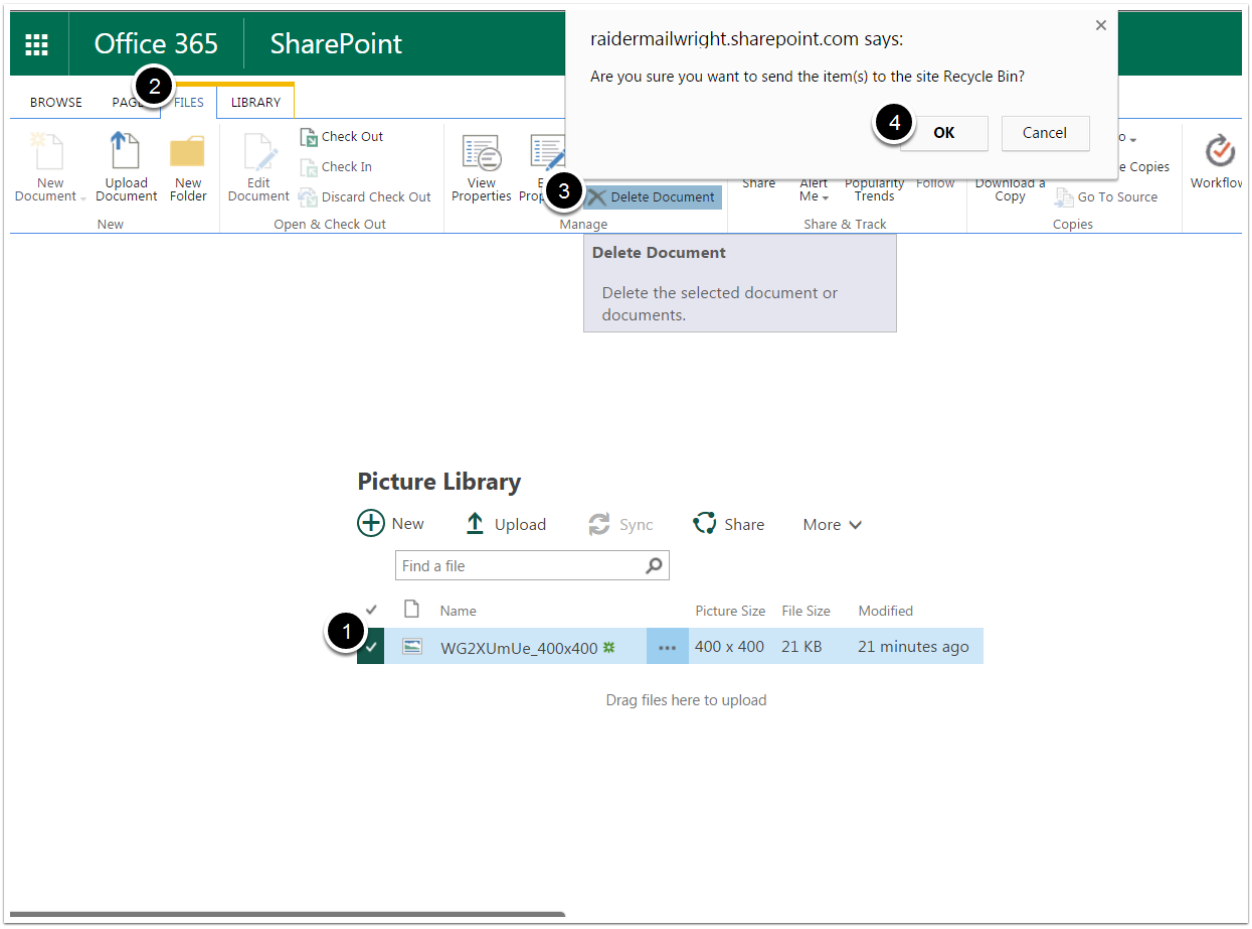
Alternatively, you can click **Slides** in the Picture Library.



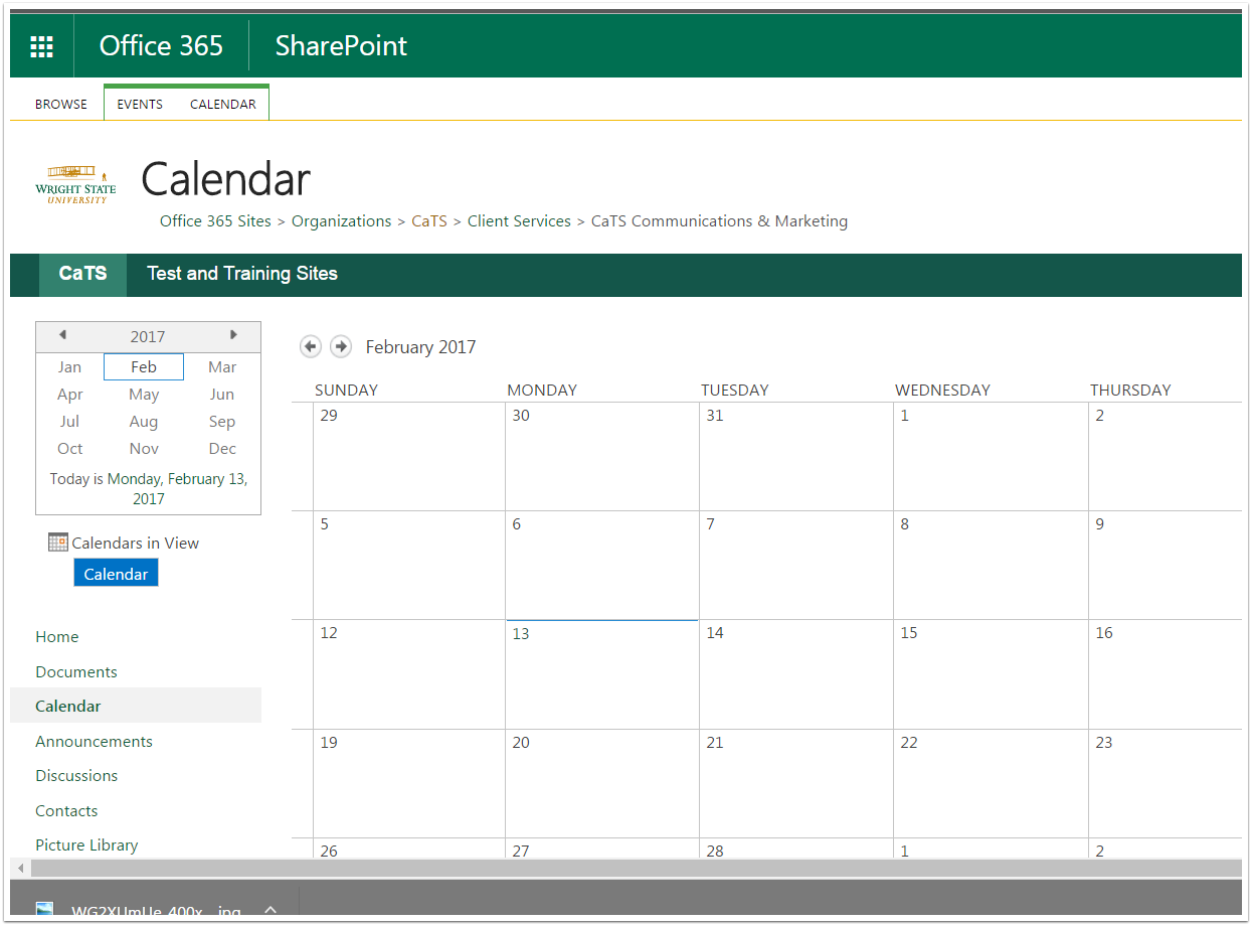
# Deleting a Picture

1. Select the picture you would like to delete.
2. Click the **Files tab**.
3. Click **Delete Document**.
4. Click **OK**.

Alternatively, you can click the **three dots** next to the picture you would like to delete > In the new menu that appears, click the **three dots** > Click **Delete**



# Calendar

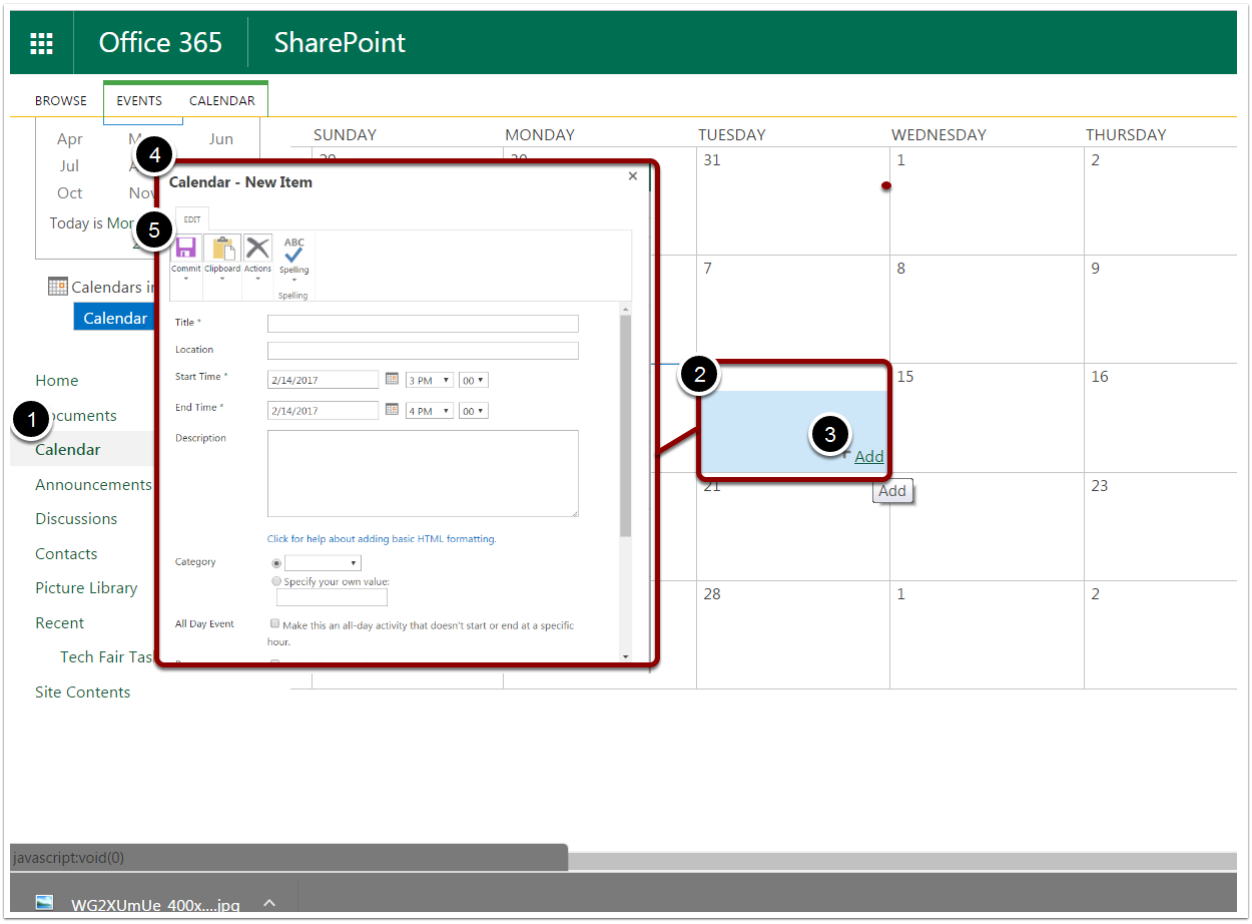

Office 365
SharePoint
BROWSE
EVENTS
CALENDAR
Calendar
Office 365 Sites > Organizations > CaTS > Client Services > CaTS Communications & Marketing
CaTS
Test and Training Sites
2017
Jan Feb Mar
Apr May Jun
Jul Aug Sep
Oct Nov Dec
Today is Monday, February 13, 2017
Calendars in View
Calendar
Home
Documents
Calendar
Announcements
Discussions
Contacts
Picture Library
February 2017
SUNDAY MONDAY TUESDAY WEDNESDAY THURSDAY
29 30 31 1 2
5 6 7 8 9
12 13 14 15 16
19 20 21 22 23
26 27 28 1 2

# Adding a New Event

1. Click **Calendar**.
2. Select the date you would like the event to occur.
3. Click **Add**.
4. In the window that appears, enter the details of your event (e.g. title, start time, end time).
5. Click **Save**.

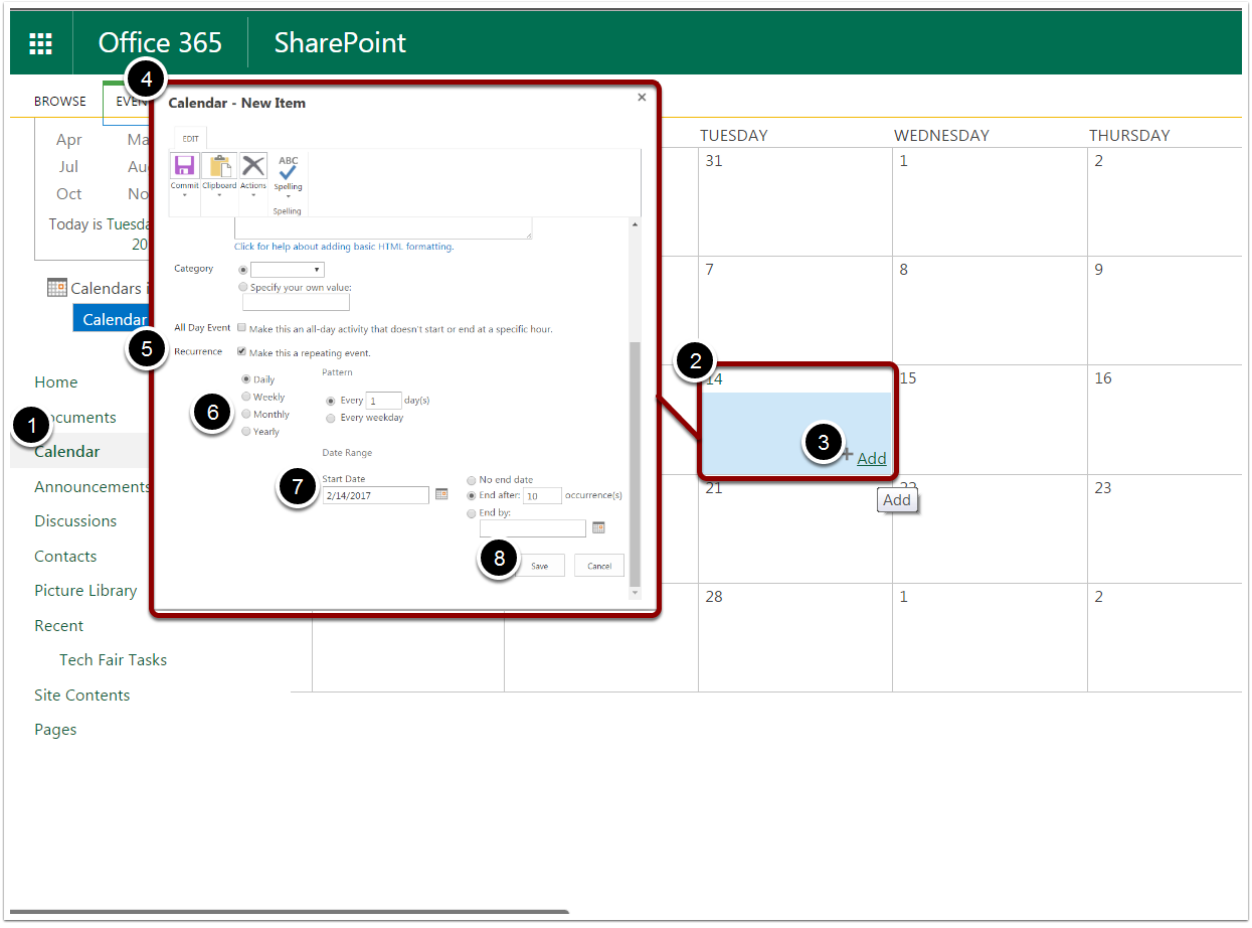
Alternatively, you can click the **Events tab** > Click **New Event**. Or click **Add New Event** under the **Calendar** link on your main SharePoint page.

***Note*** You can make the event an all-day event by checking the box next to **Make this an all-day activity** > Click **Save**.



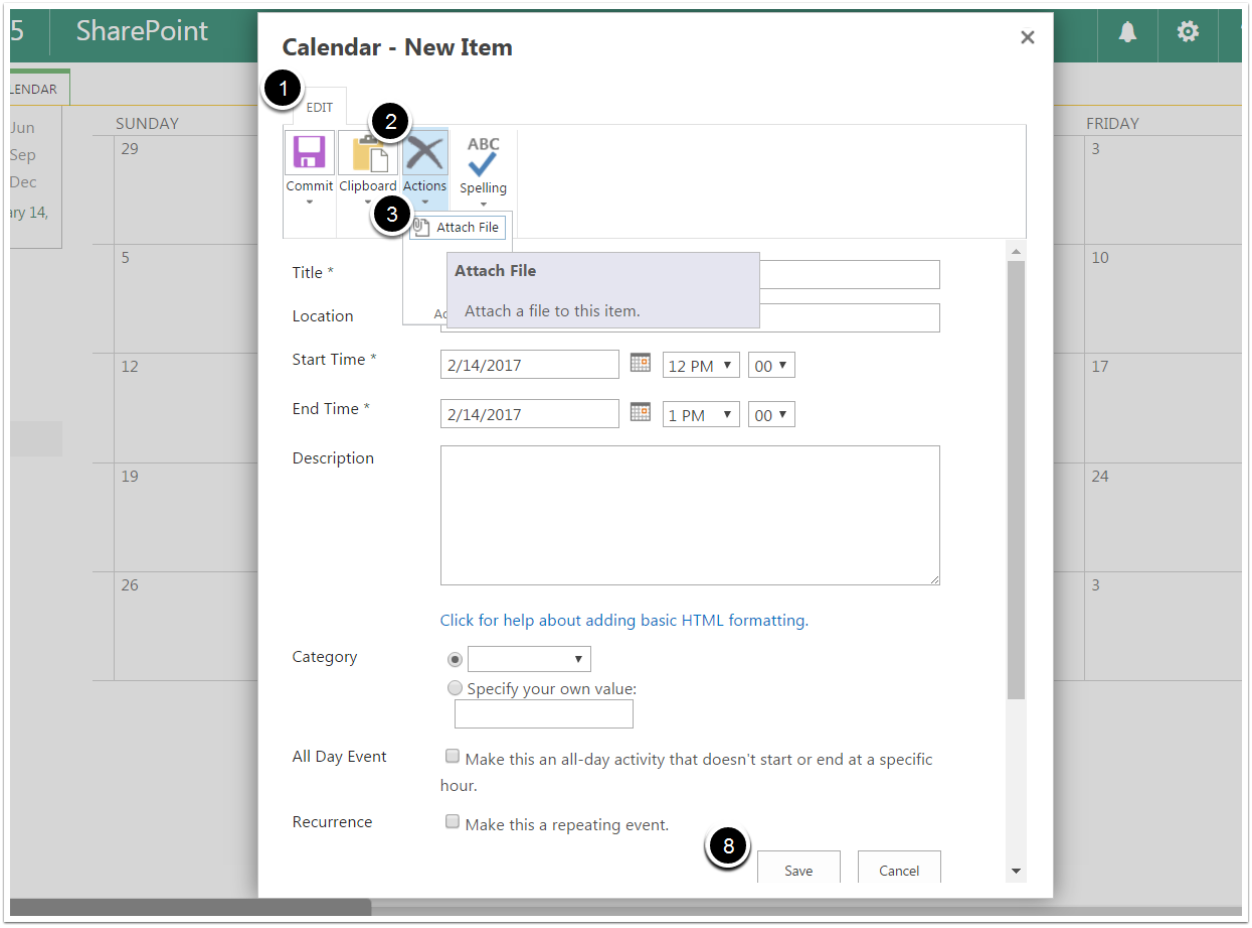
# Creating a Recurring Event

1. Click **Calendar**.
2. Select the date you would like the event to occur.
3. Click **Add**.
4. In the window that appears, enter the details of your event (e.g. title, start time, end time).
5. Check the box next to **Make this a repeating event**.
6. Choose your frequency (e.g. Daily, Weekly, or Monthly).
7. Select a start and end date.
8. Click **Save**.



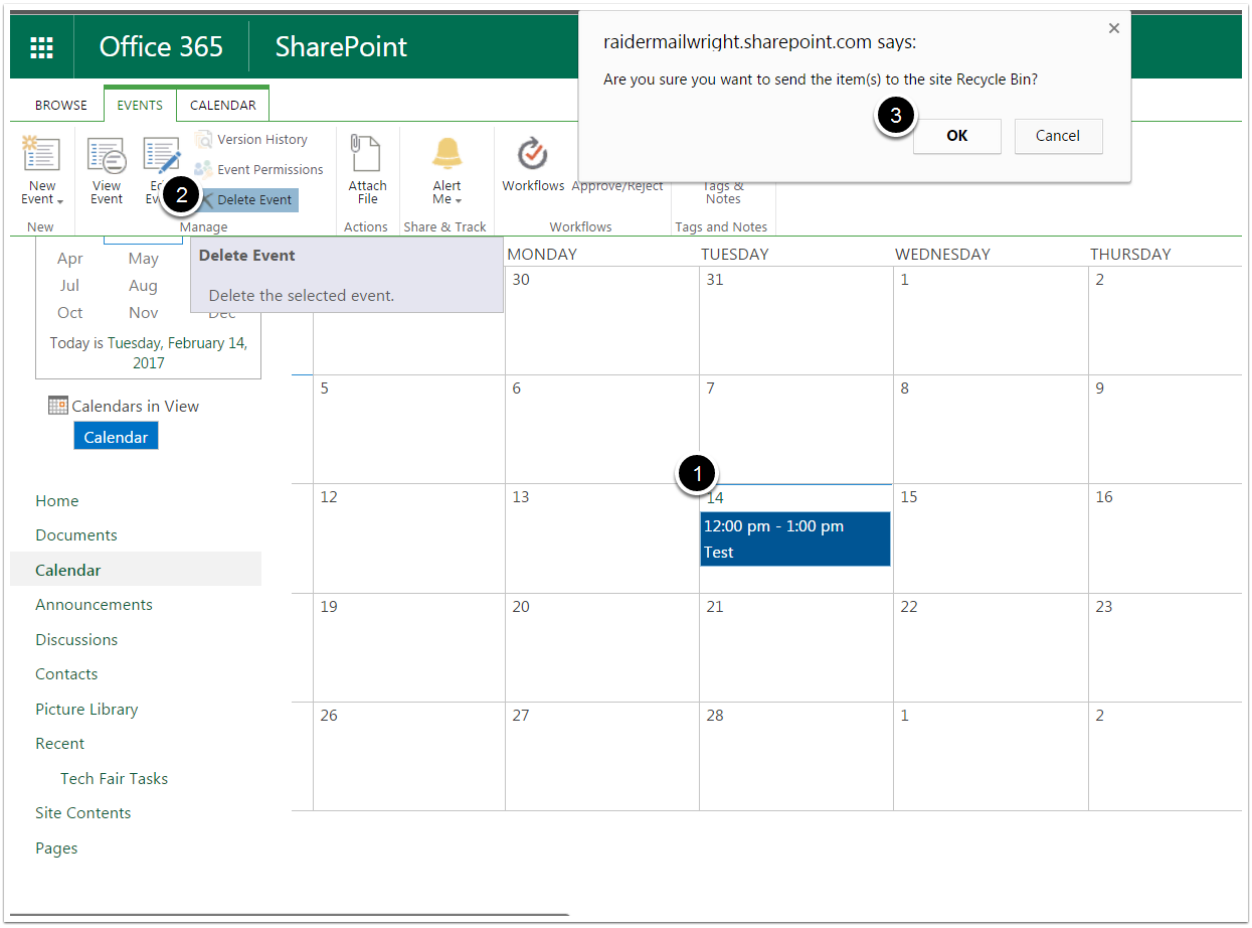
# Attaching a File to an Event

1. When creating a new event, click the **Edit tab**.
2. Click **Actions**.
3. Click **Attach File**.
4. Click **Choose File**.
5. Select the file you would like to attach.
6. Click **Open**.
7. Click **Ok**.
8. Click **Save**.



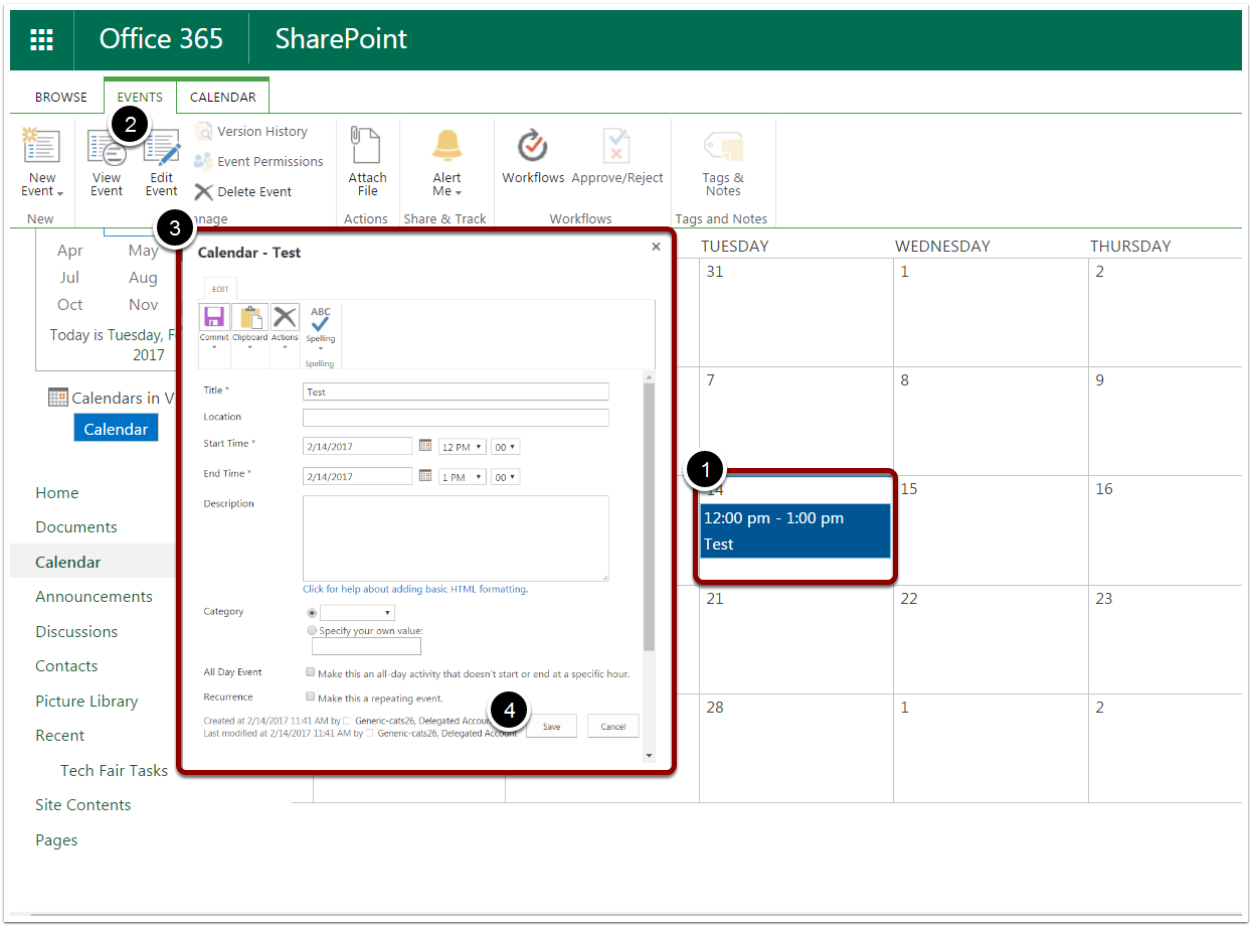
# Deleting an Event

1. Select the event you would like to delete.
2. Click **Delete Event**.
3. Click **OK**.



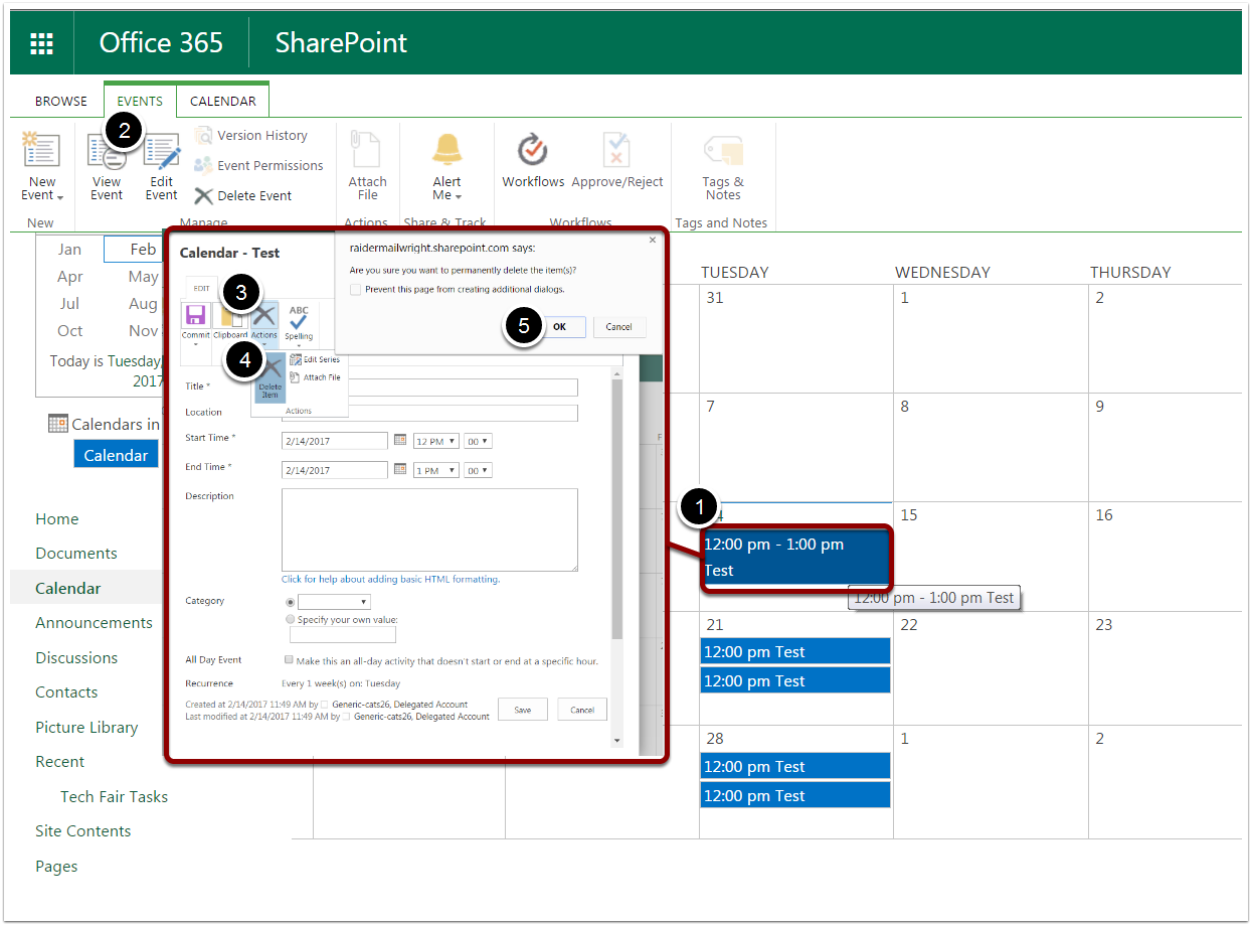
# Editing a Recurring Event

1. Select the event you would like to edit.
2. Click **Edit Item**.
3. In the window that appears, make your necessary edits.
4. Click **Save**.



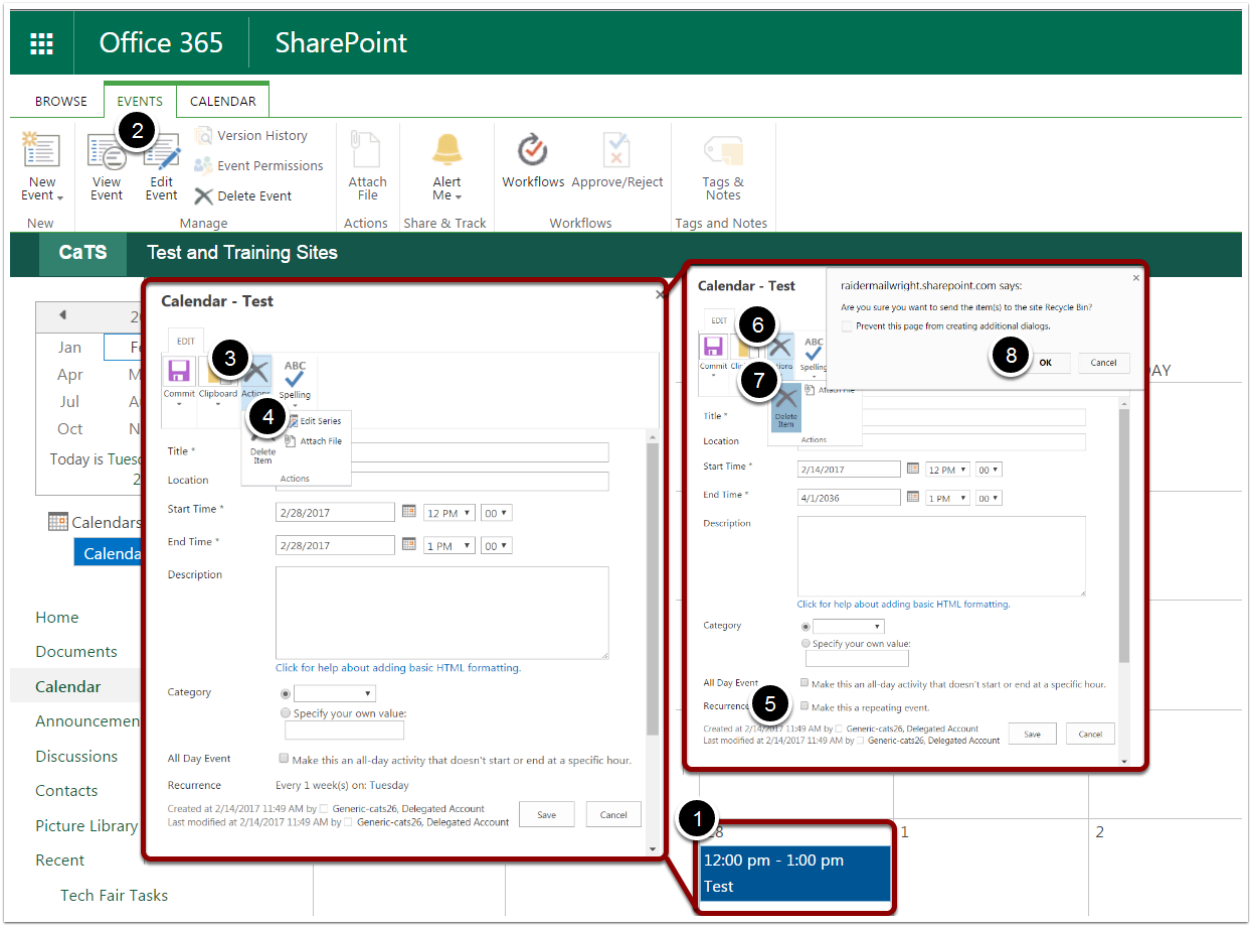
# Deleting One Occurrence in a Recurring Event

1. Select the event you would like to delete.
2. Click **Edit Event**.
3. Click **Actions**.
4. Click **Delete Item**.
5. Click **OK**.



# Deleting the Whole Series in a Recurring Event

1. Select the event you would like to delete.
2. Click **Edit Event**.
3. Click **Actions**.
4. Click **Edit Series**.
5. Uncheck the **Recurrence** box.
6. Click **Actions**.
7. Click **Delete Item**.
8. Click **OK**.

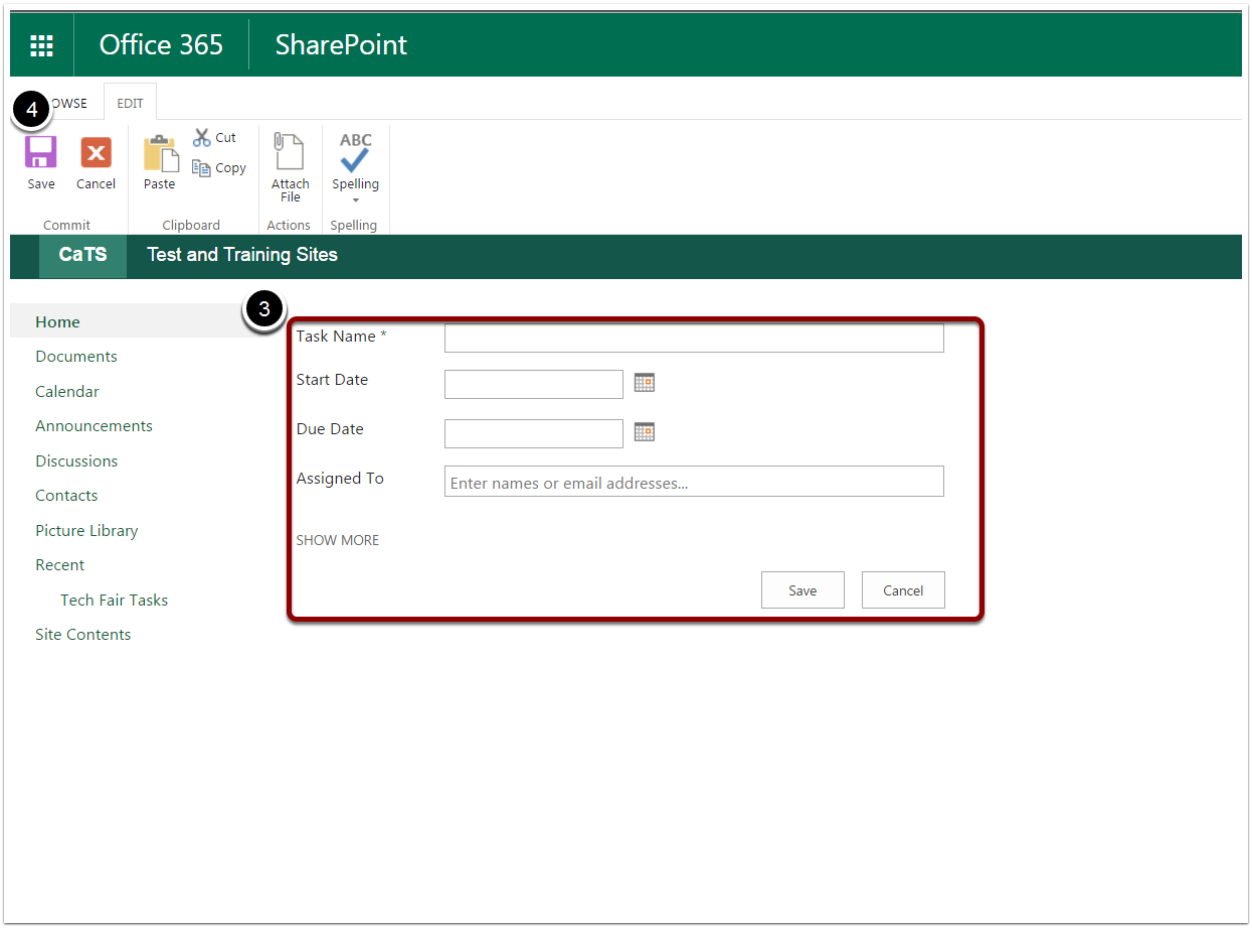


# Task Lists

## Adding a New Task

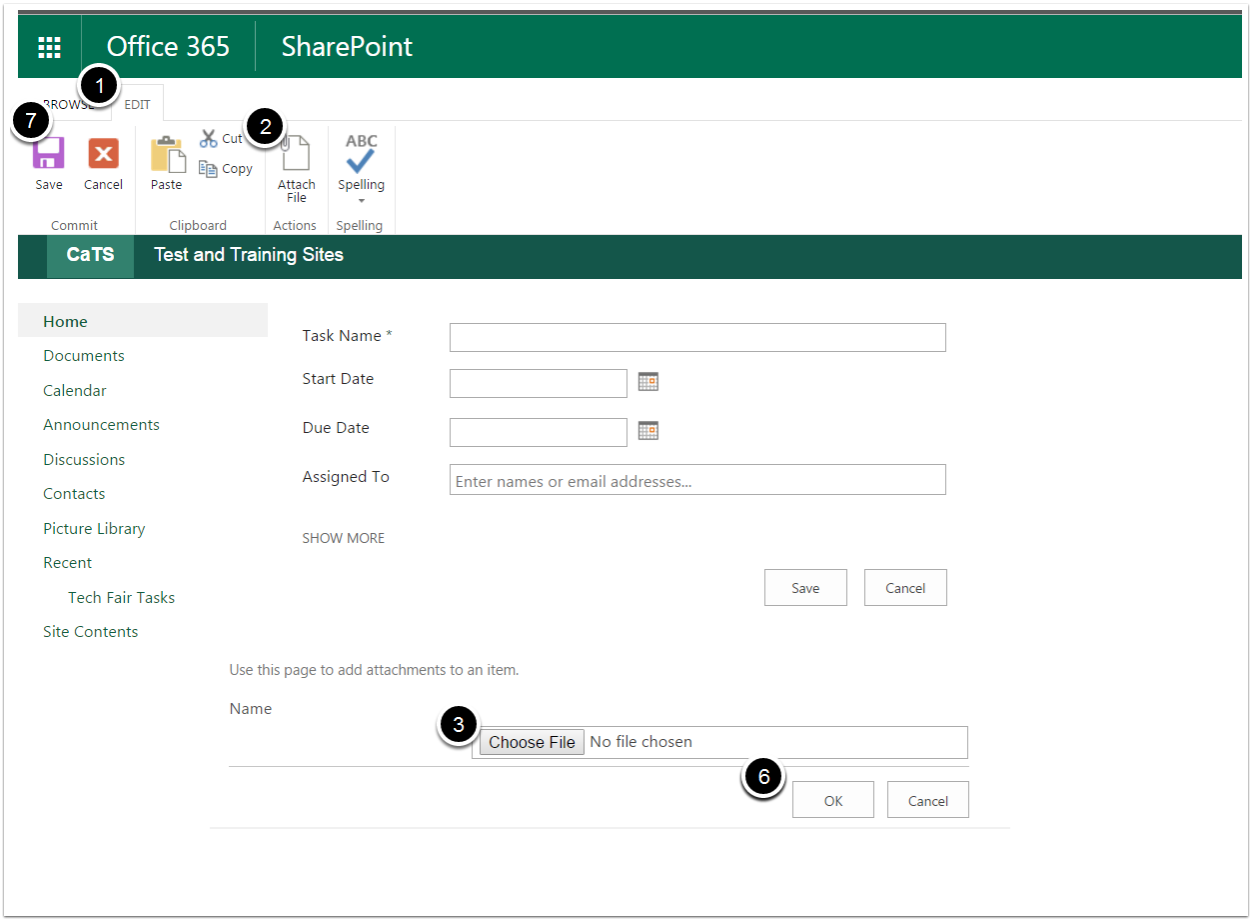
1. Click **Tasks**.
2. Click **New Task**.
3. In the textboxes provided, enter any details of the task you would like to add.
4. Click **Save**.

**Note** You can add tasks to your timeline by selecting the task and clicking **Add to Timeline**.



# Attaching a File

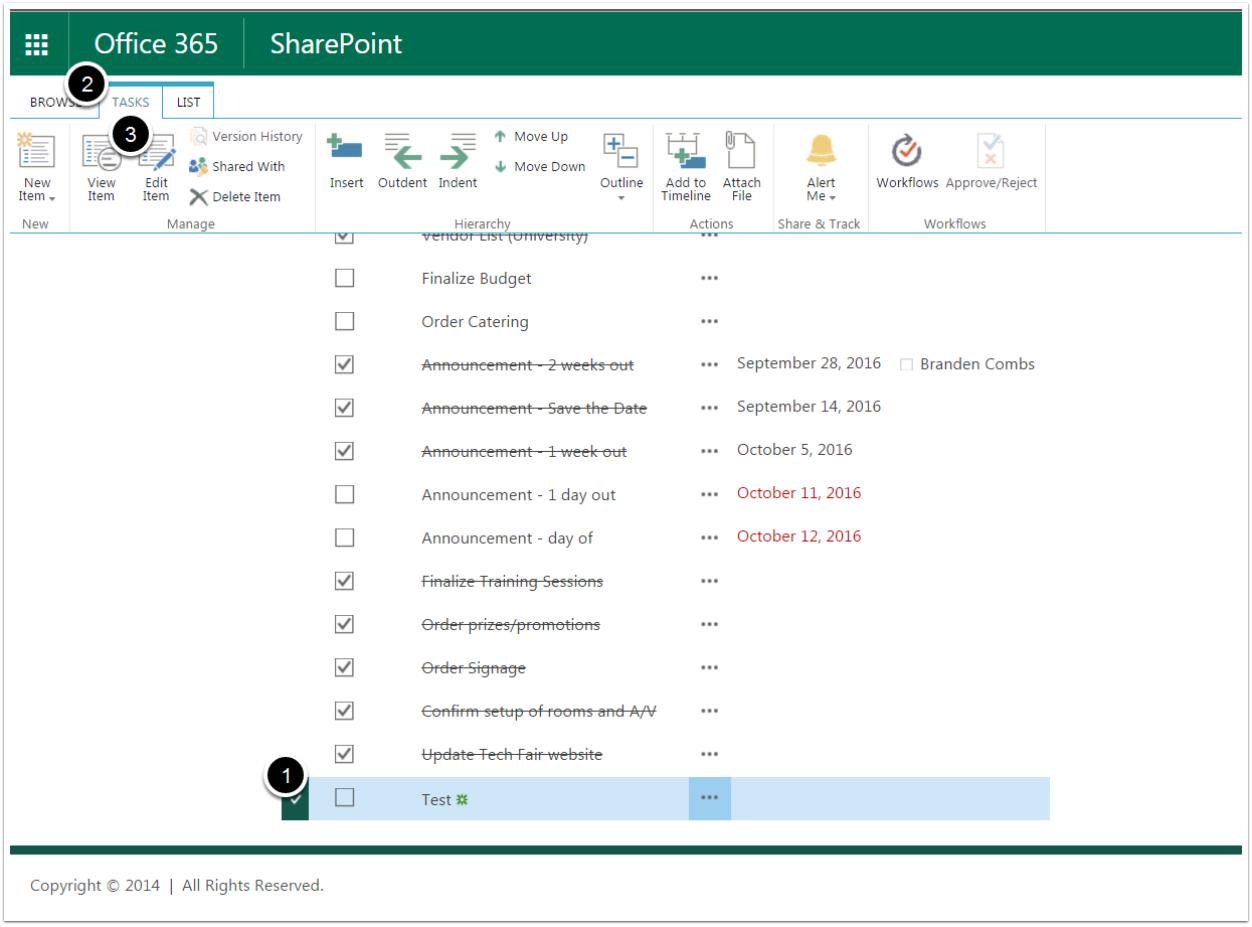
1. When you are creating a task, click the **Edit tab**.
2. Click **Attach File**.
3. Click **Choose File**.
4. Select the file you would like to attach.
5. Click **Open**.
6. Click **OK**.
7. Click **Save**.



# Editing a Task

1. Select the task you would like to edit.
2. Click the **Tasks tab**.
3. Click **Edit Item**.
4. Make your necessary edits.
5. Click **Save**.

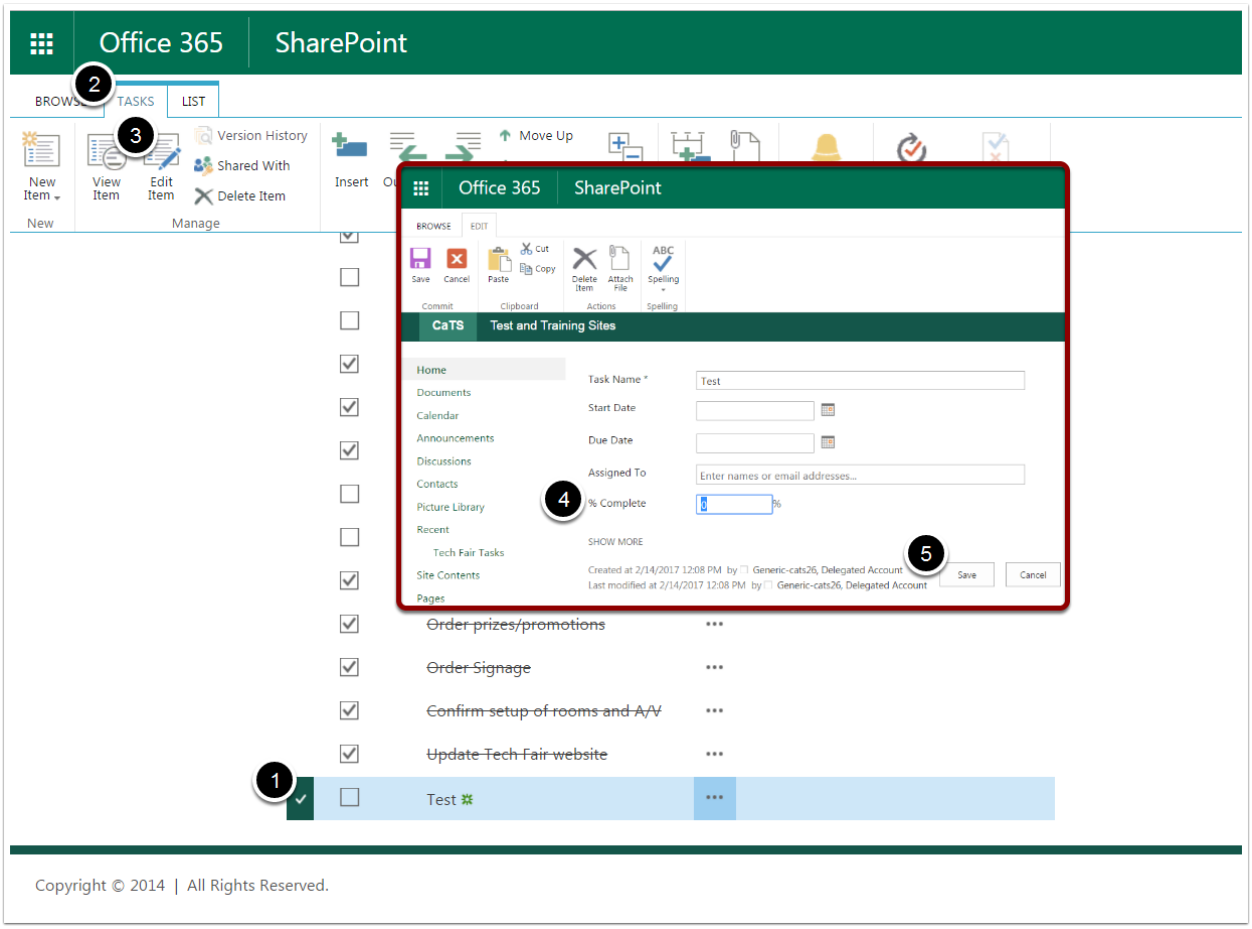
Alternatively, you can select the task > Click the **Edit tab** > Click **Edit Item** > Click **Save**



# Updating a Task

1. Select the task you would like to update.
2. Click the **Tasks tab**.
3. Click **Edit Item**.
4. In the page that appears, update the **Completeness Percentage**.
5. Click **Save**.

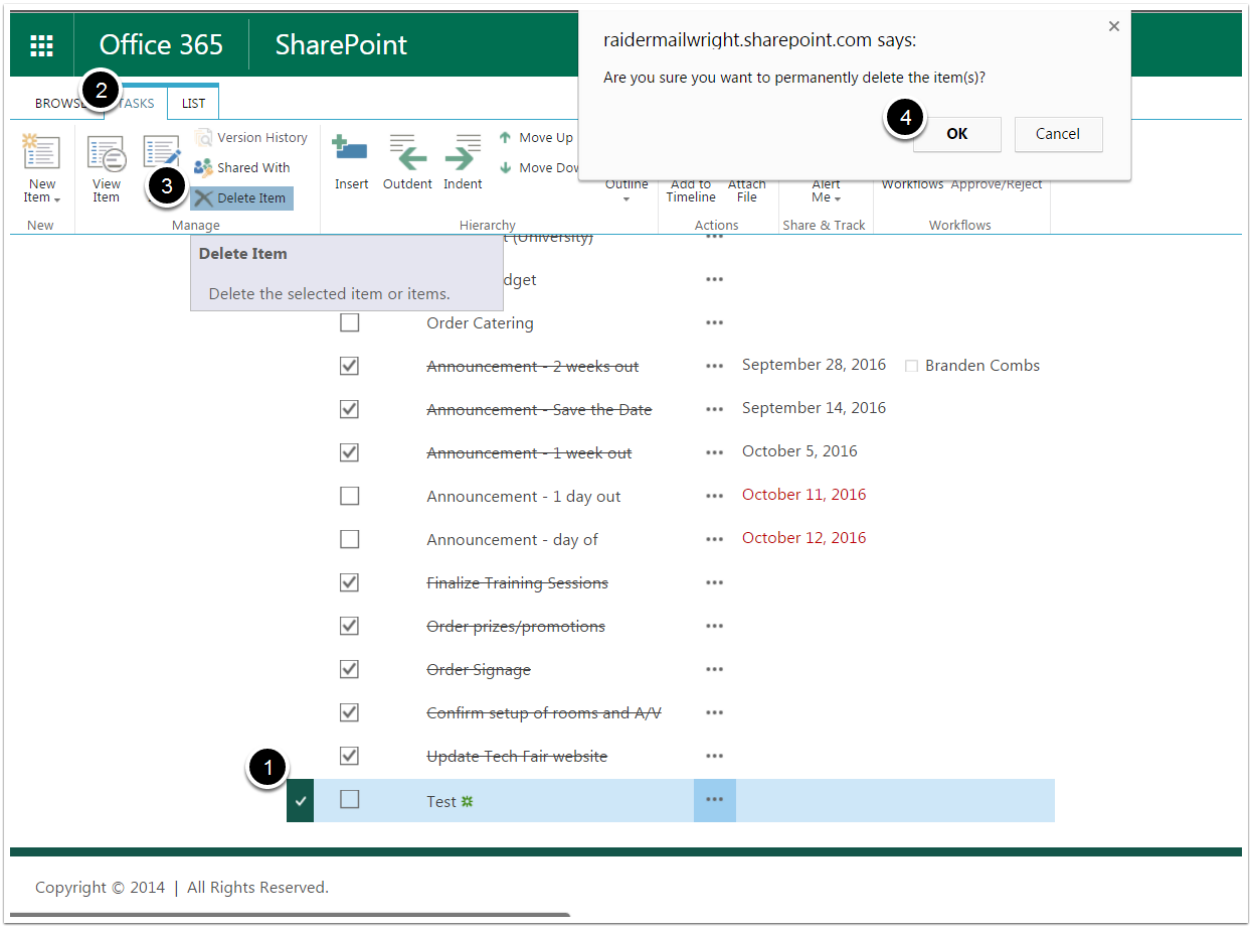
Alternatively, you can select the task > Click the **Edit tab** > Click **Edit Item** > Click **Save**



# Deleting a Task

1. Select the task you would like to delete.
2. Click the **Tasks tab**.
3. Click **Delete Item**.
4. Click **OK**.

Alternatively, you can click the **three dots** next to the task > In the new menu that appears, click the **three dots** > Click **Delete Item**

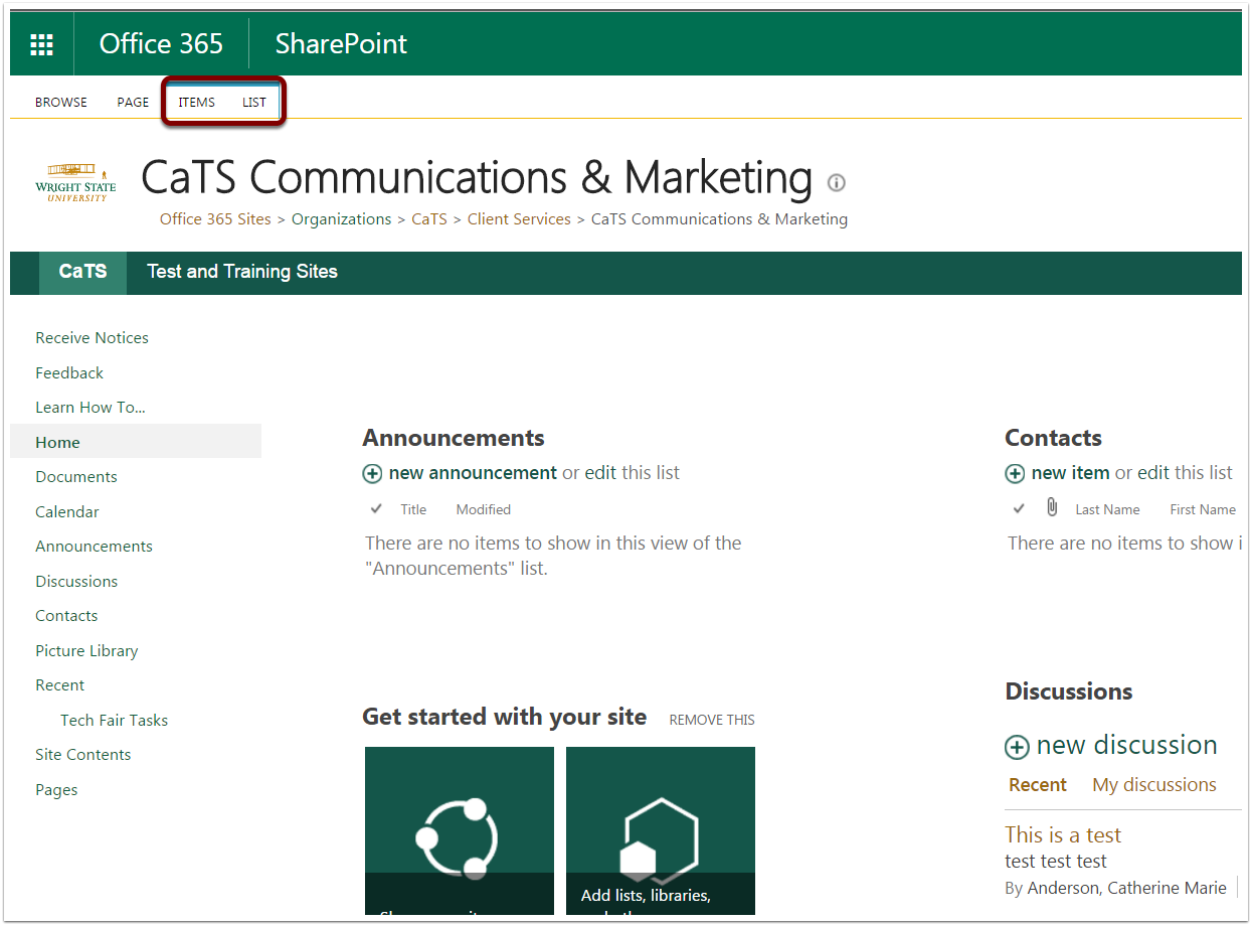


# Lists

## Introduction to Lists

Your **Lists** are a collection of datat you can share with other users. There are four different Lists:

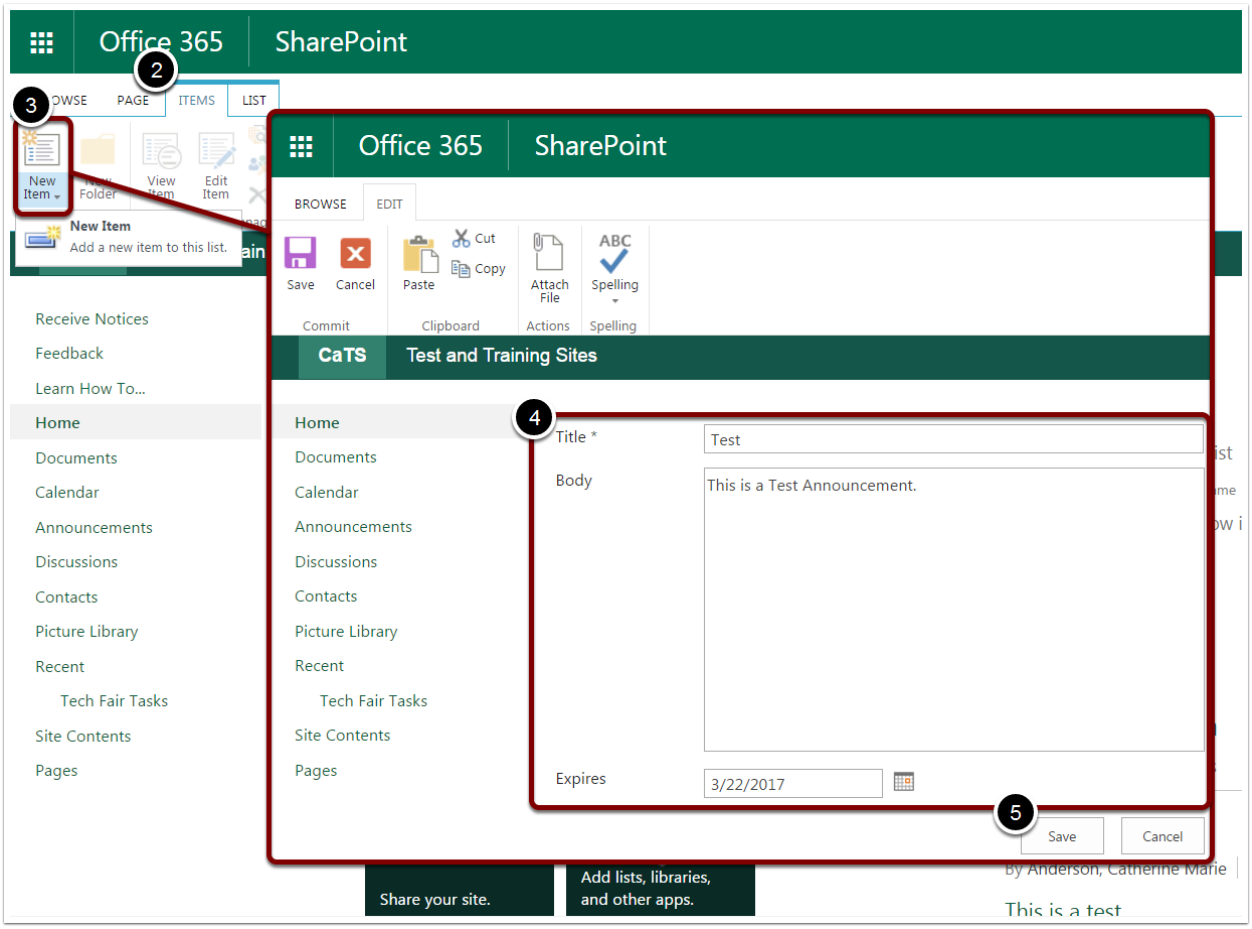
1. **Announcements** - Here, you can make announcements and view announcements from other users.
2. **Calendar** - Here, you can view all of the events scheduled.
3. **Tasks** - Here, you can view assigned tasks and things to do.
4. **Contacts** - Here, you can view all of your contacts' information.



# Creating a New Item

1. Click under the list you would like to add a new item to.
2. Click **Items**.
3. Click **New Item**.
4. Fill in the necessary information.
5. Click **Save**.

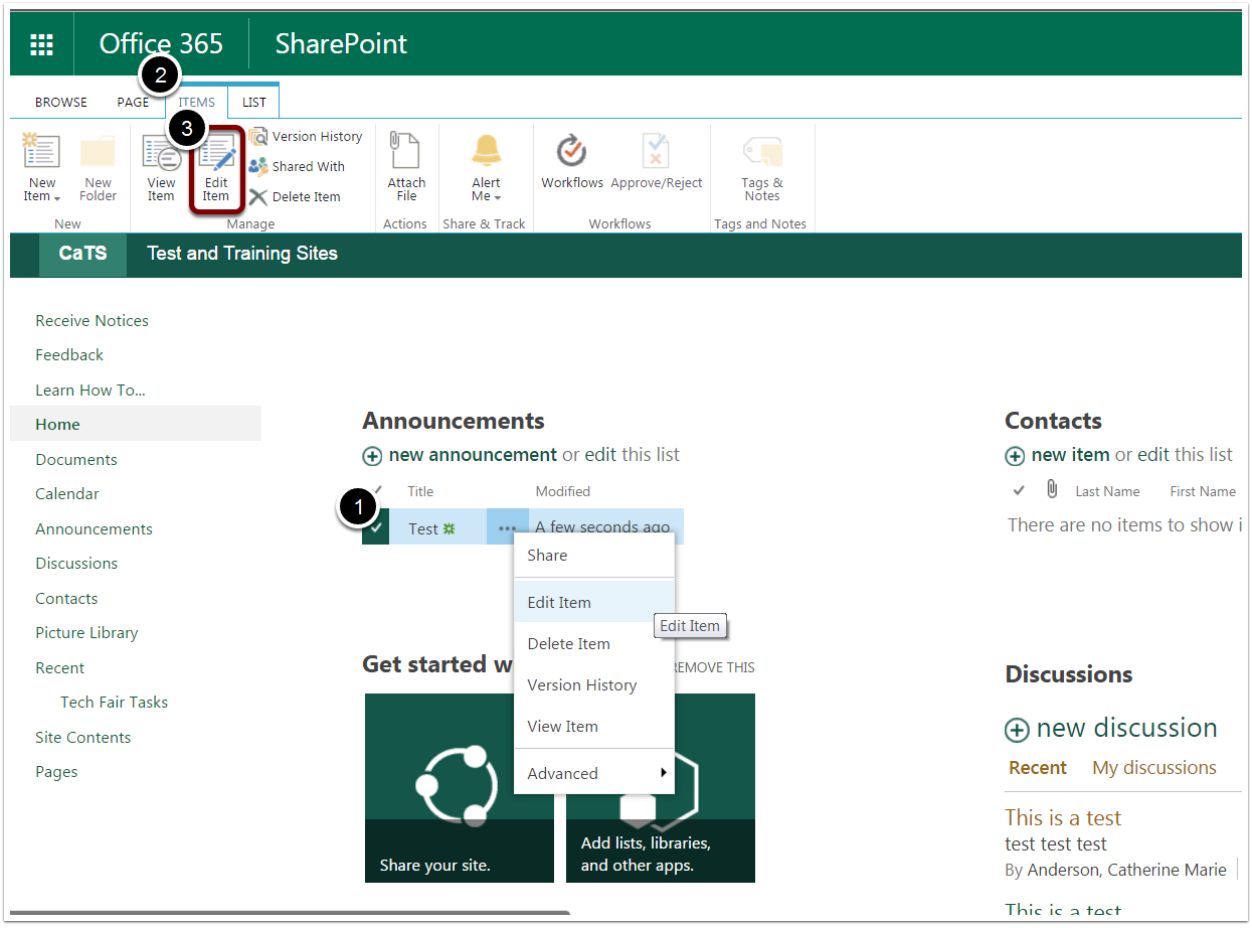
***Note*** The information provided will vary depending on which List you add the item under. For instance, if you add a new item to your **Contacts List**, it will require different information than if you add a new item to your **Calendar**. The image below shows the screen you will see if you add a new item to your **Announcements List**.



# Editing an Item

1. Select the item you would like to edit.
2. Click **Items**.
3. Click **Edit Item**.
4. On the new page that appears, make your necessary edits.
5. Click **Save**.

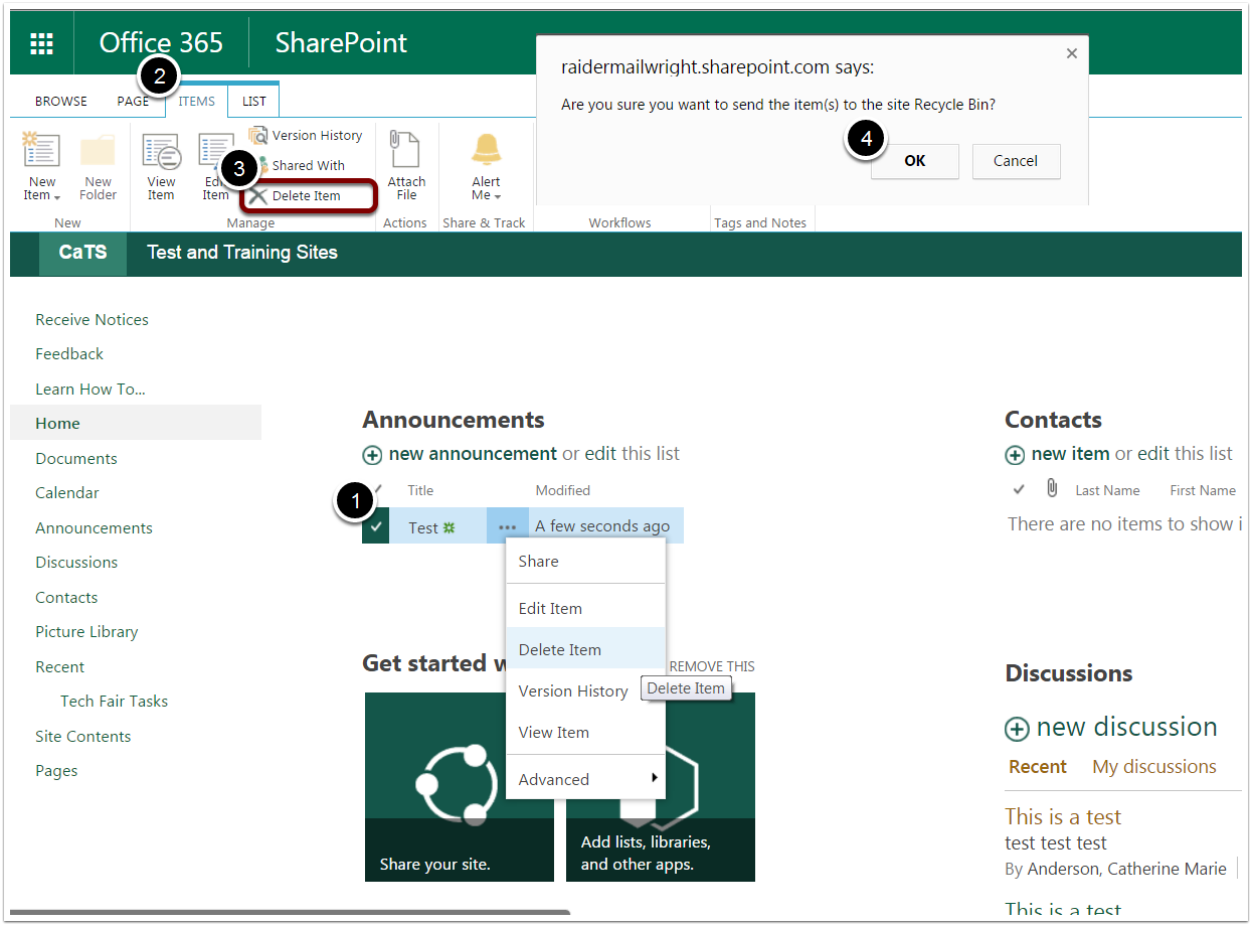
Alternatively, you can click the **three dots icon** > Click **Edit Item**.



# Deleting an Item

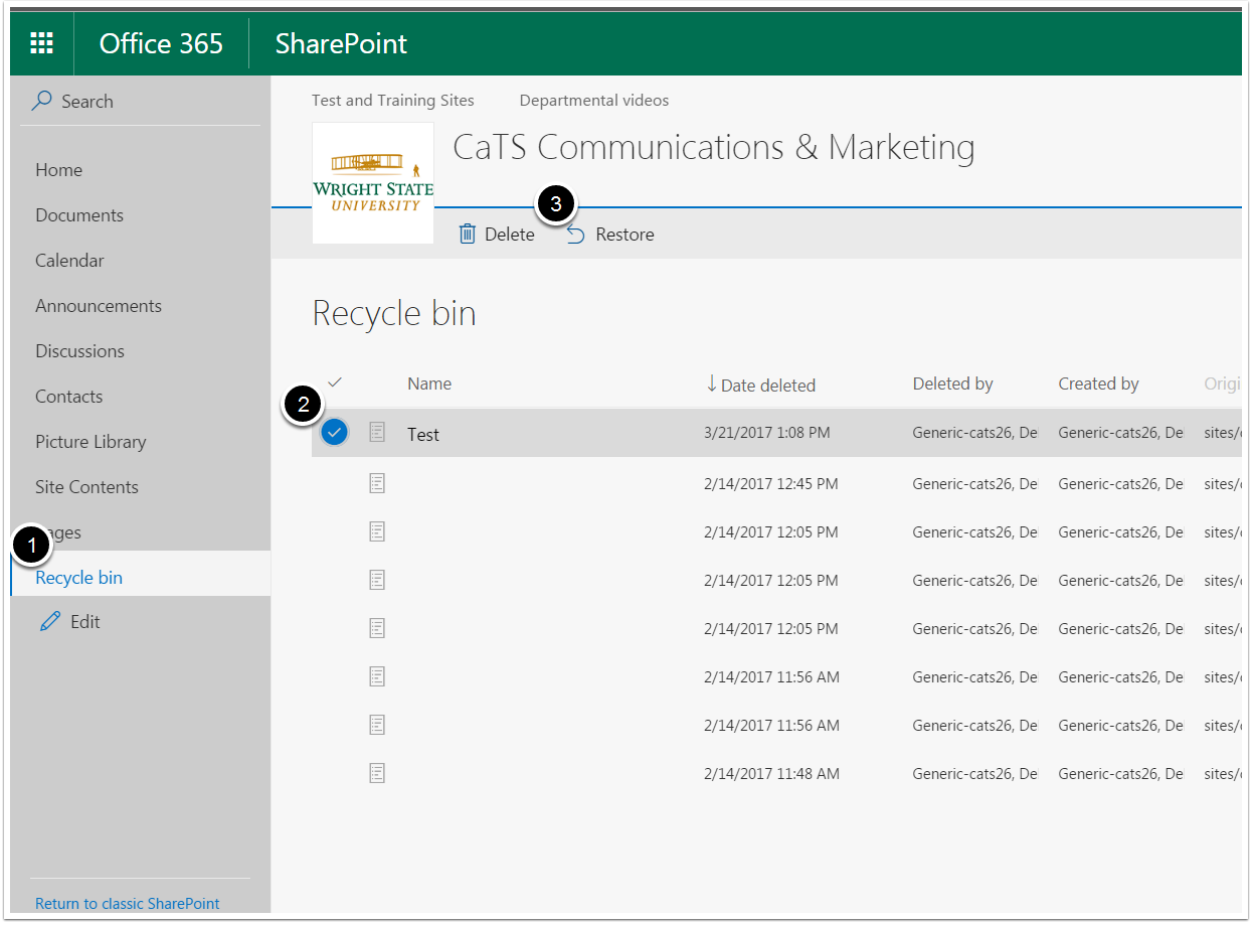
1. Select the item you would like to delete.
2. Click **Items**.
3. Click **Delete Item**.
4. Click **OK**.

Alternatively, you can click the **three dots icon** > Click **Delete Item**.



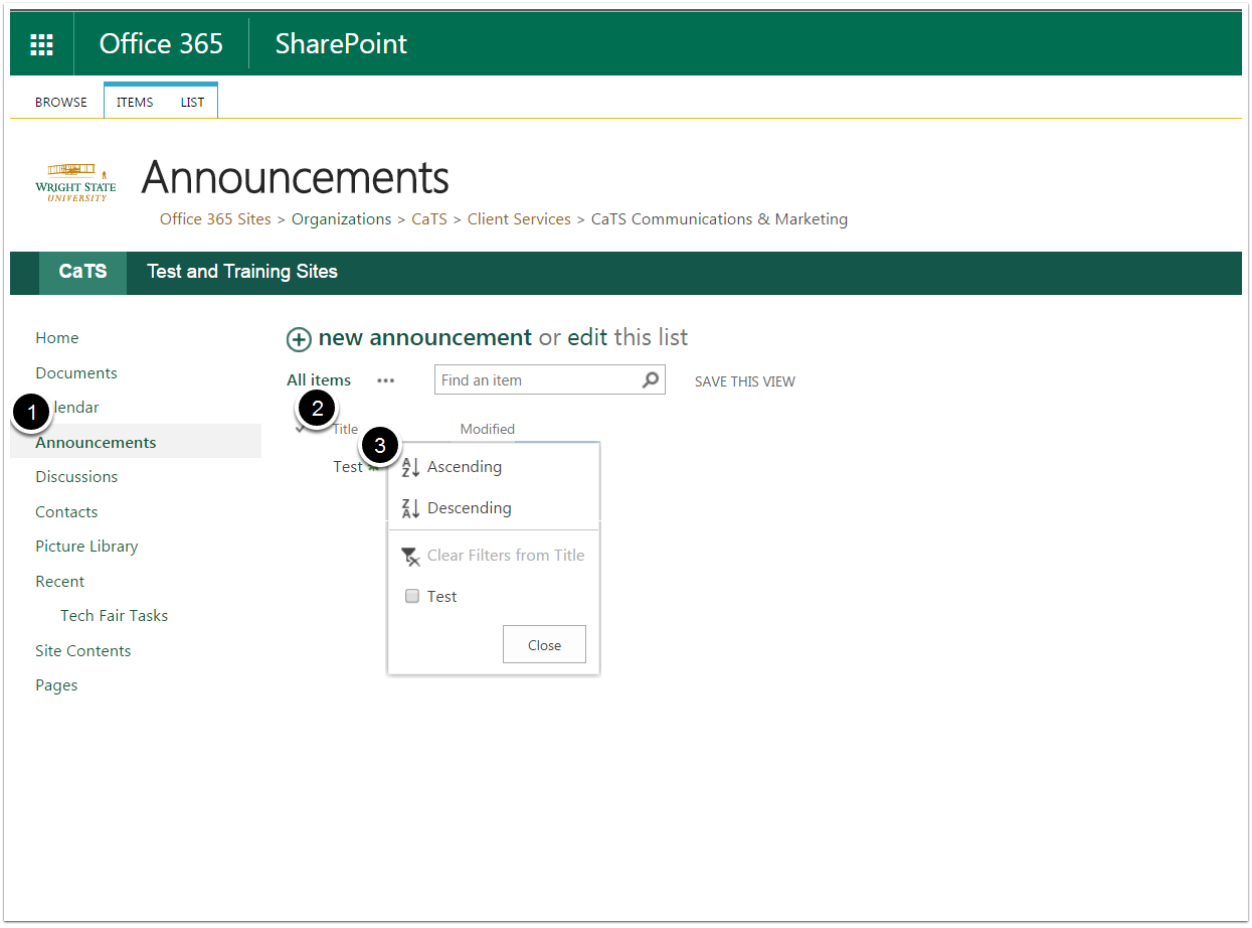
# Recovering an Item from the Recycle Bin

1. Click **Recycle Bin**.
2. Select the item you would like to recover.
3. Click **Restore**.



# Sorting Items

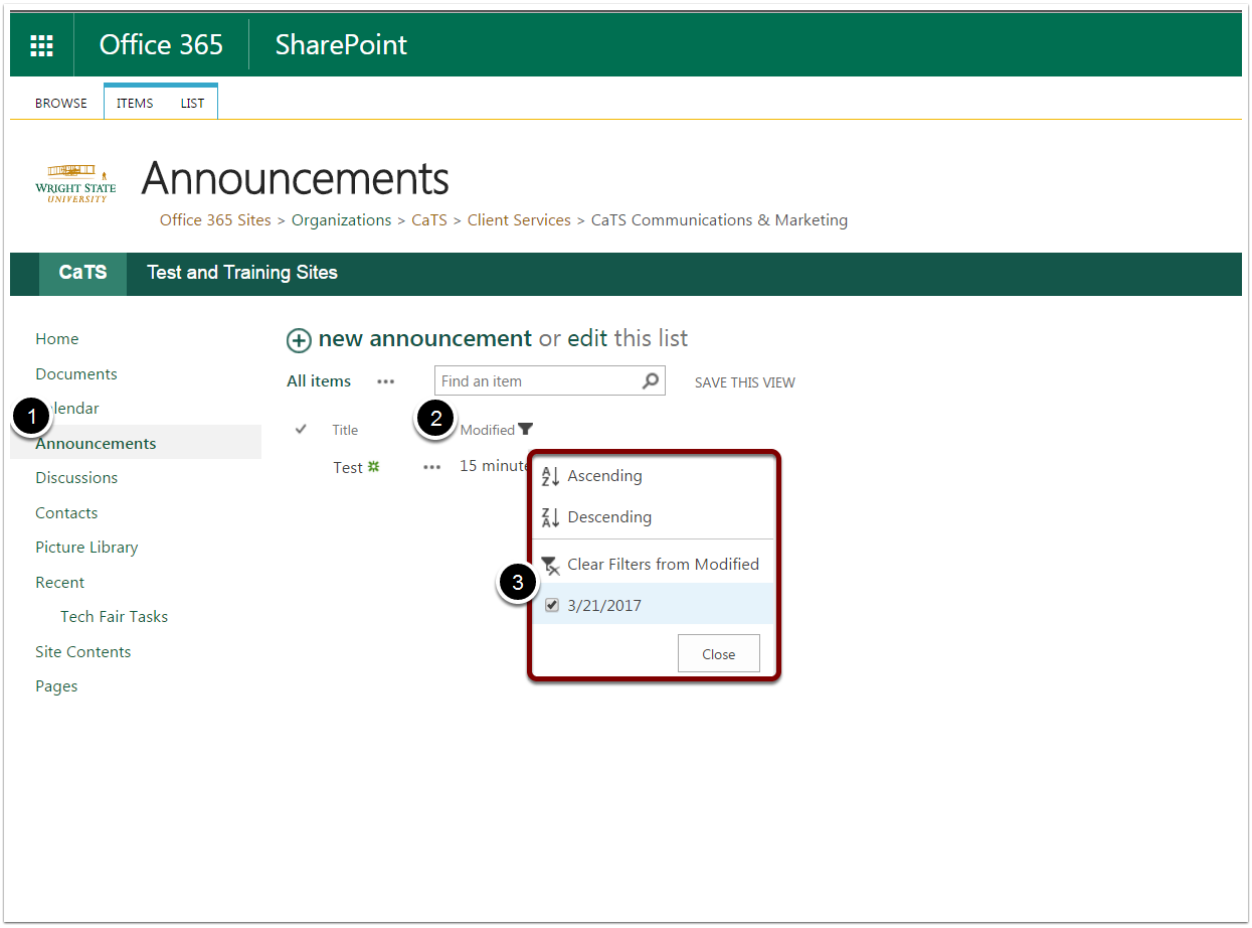
1. Click into the List of Items you would like to sort.
2. Click the drop down menu under whatever you would like to sort the items by.
3. Click **Ascending** or **Descending**. Your items will immediately be sorted and you can



# Filtering Items

1. Click into the List of Items you would like to filter.
2. Click the drop down menu under whatever you would like to filter the items by.
3. Click the option to filter the list. A gray icon will appear next to the menu to indicate that it has been filtered.

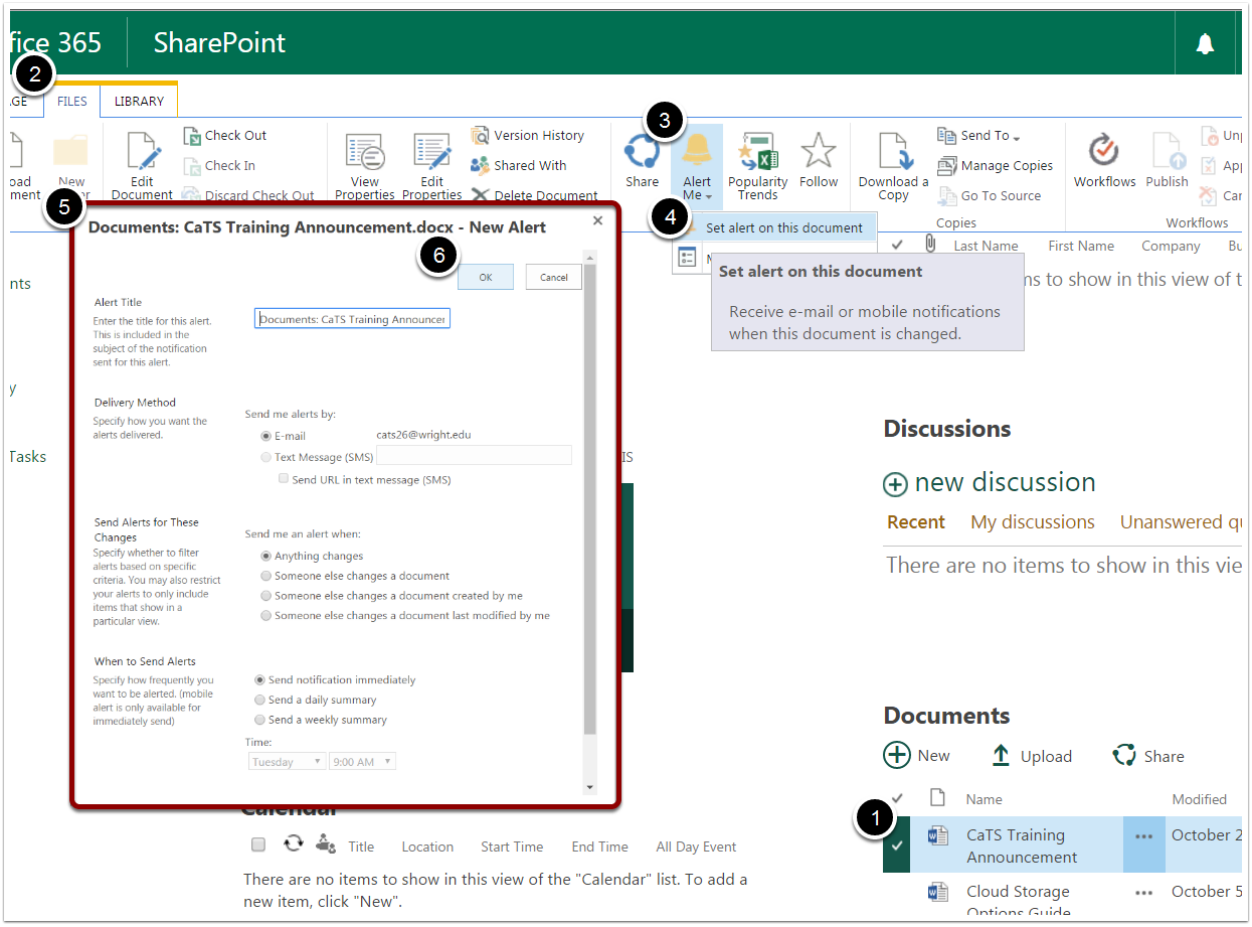
**Note** To clear your filters, simply click **Clear Filters** under the drop down menu.



# Other Features

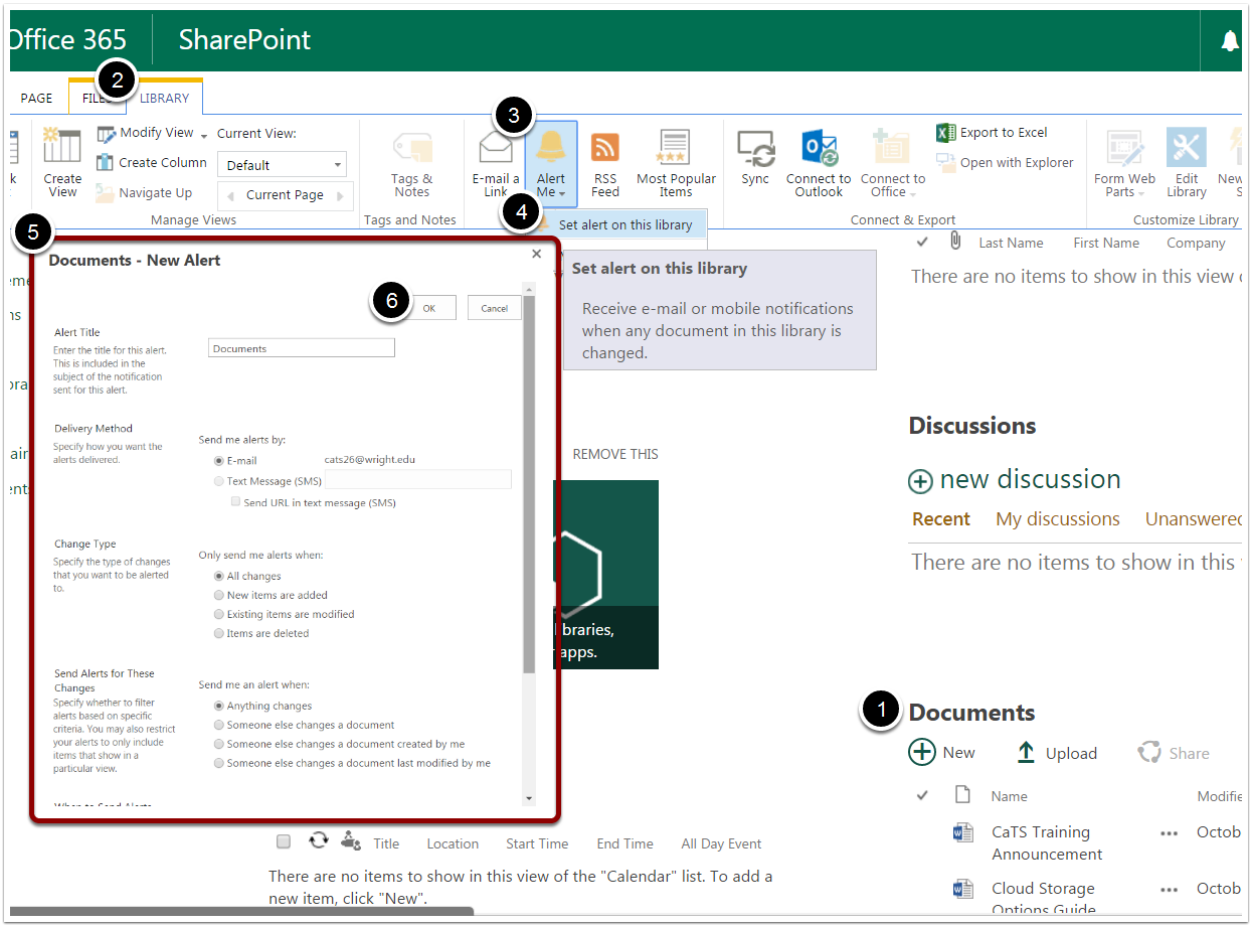
## Setting an Alert for an Item or Document

1. Select the file for which you would like to set the alert.
2. Click the **Files tab**.
3. Click **Alert Me**.
4. Click **Set alert on this document**.
5. In the window that appears, add the email addresses of those whom you would like to alert. Here, you can also select when and how often the alert should appear.
6. Click **OK**.



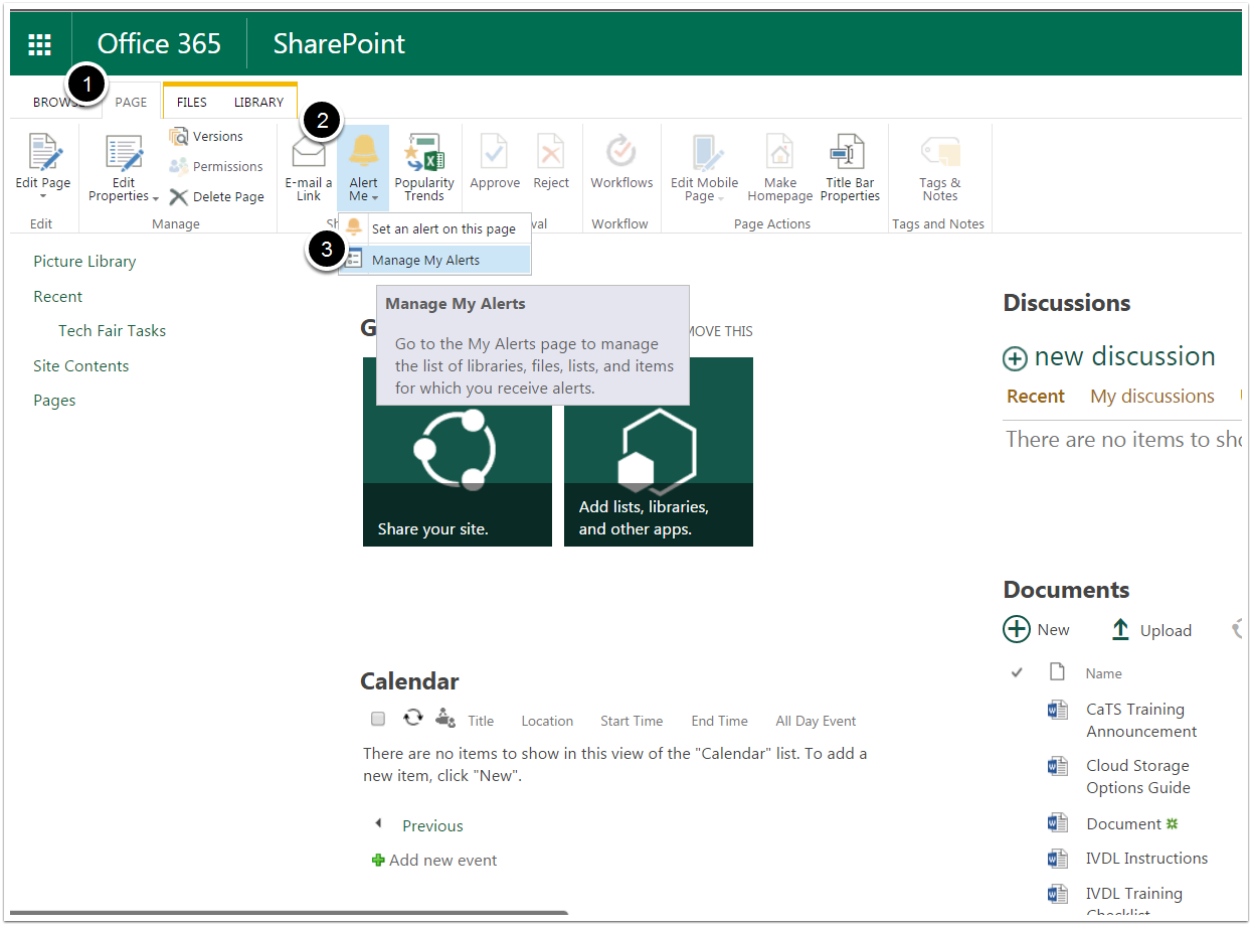
# Setting an Alert for a List or Library

1. Select the List or Library for which you would like to set the alert.
2. Click the **List/Library tab**.
3. Click **Alert Me**.
4. Click **Set alert on this list/library**.
5. In the window that appears, add the email addresses of those whom you would like to alert. Here, you can also select when and how often the alert should appear.
6. Click **OK**.



# Managing and Removing Alerts

1. Click the **Page tab**.
2. Click **Alert Me**.
3. Click **Manage Alerts** from the dropdown menu.
4. From here, you can add, edit, or delete your alert(s).



# FAQs and Notes

## FAQs

**Q: Can multiple users work on the same document simultaneously in SharePoint?**

A: Yes! With SharePoint's real-time coauthoring of files, each employee can work on the same document at once, see the changes in real-time and rest assured that SharePoint is automatically updating the file as they go.

**Q: Does SharePoint allow me to search the contents of files instead of just by filename?**

A: Yes! Think of SharePoint's search tool like a web search for your business. It's constantly crawling your network analyzing file contents, titles, dates and metadata to deliver you relevant results and detailed previews. Find that file right away!

**Q: Can we go back to look at previous file versions in SharePoint?**

A: Yes! With SharePoint's unlimited file versioning, you can click on a specific document and retrieve previous versions, right back to the moment it was created. Not only that, you can see when the version was created and who make the changes. File versioning is particularly handy when business strategies change and an employee needs to retrieve a previous edit they thought had been lost forever!

## Notes

- You have up to 10GB worth of storage space in SharePoint!
- Forget where something is saved? Office 365 Delve can help you find any documents you've uploaded, including shared documents from your team! Find out more about Delve at http://www.wright.edu/information-technology/services/office-delve.
- Working on the go? You can download the SharePoint app on any iOS or Android device! Visit your OS's app store and install the SharePoint app for free.