GETTING TO KNOW SHAREPOINT

Microsoft SharePoint Online is a business collaboration platform that allows people to build websites. Unlike typical internet websites, however, SharePoint sites make use of special features – such as lists, libraries, apps, web parts, and more – that make it easier for people to work collaboratively.

In this chapter you will be introduced to SharePoint Online and many of its key features.

In this session you will:

- ✓ gain an understanding of **SharePoint**
- ✓ gain an understanding of **SharePoint** sites
- ✓ gain an understanding of team sites
- ✓ gain an understanding of the main components comprising a **SharePoint** site
- ✓ gain an understanding of apps
- ✓ learn how to start **SharePoint**
- ✓ learn how to sign out of **SharePoint**.

WHAT IS SHAREPOINT?

Microsoft SharePoint is either a network-based product that is installed on your company's servers or is cloud-based for Office 365 users (known as SharePoint Online which is the Sharepoint used in this manual). In very simple terms, SharePoint is a tool that allows people to create websites where they can work together, save documents and find information.

What Is SharePoint Used For?

SharePoint has an enormous number of features and components that can be turned on and off by the administrator as desired. As a result of this, SharePoint is extremely flexible allowing it to be used for many different business purposes. For example:

- SharePoint is commonly used to improve collaboration among teams of people in organisations, such as in the Finance Division or HR. To do this, you create SharePoint **team sites**. A team site is a website in which members can upload and share documents, assign tasks, view team events and meetings on a shared calendar, and more.

- SharePoint provides an organisation with a place to store all of its content. Rather than saving documents on multiple shared network drives, or on personal drives and then people having to email them back and forth, it's easier to place all content in one centrally-managed repository. By using the security options in SharePoint, sensitive content can be placed in areas where it can be monitored and accessed by a limited number of people, while other content can be placed in areas where everyone has total access to it.

- In many larger organisations, SharePoint is often used as a corporate intranet. A corporate intranet connects the individual SharePoint sites within the organisation and allows access to information and business applications. For example, staff can download forms, read the latest company news, perform company-wide searches for documents, and more.

What Do SharePoint Sites Look Like?

It is almost safe to say that no two SharePoint sites will look or be the same – this is because of choices made during the building of SharePoint sites and because the sites are accessed using different web browsers, such as Microsoft Edge, Firefox, Chrome and so on.

- **Permissions** – If you have been assigned the **Full Control** permission level, you have access to the full range of options to manage the site. If you have been assigned the **Edit** permission level, you will have access to fewer options. If you have been assigned the **Read** permission level, you can only read content but not change it. Note that permissions are flexible and your organisation may create their own permission settings.

- **Customisation** – Your organisation may choose to customise SharePoint. For example, it may apply branding to a site, customise site navigation, remove the ribbon functionality, and more. SharePoint is highly flexible.

- **SharePoint Version** – SharePoint is available in several versions. **SharePoint Foundation** is the underlying technology for all SharePoint sites and it is installed on Windows-based servers. If you are prompted by Windows to sign in to a network, you have access to SharePoint Foundation as a minimum.

  Although Foundation provides a great deal of functionality, larger organisations are more likely to install **SharePoint Server** (and there are two editions of this product – **Standard** and **Enterprise** – each adding more features) to gain additional functions and capabilities from those provided by the underlying Foundation. A final version of SharePoint is **SharePoint Online** which is available with Office 365. This version is based on Foundation but it can offer additional functionality, depending on the Office 365 plan that your organisation has purchased, such as Office 365 Midsized Business or Office 365 Enterprise E3.

  The functionality differs between versions. For example, SharePoint Foundation is ideal for building collaboration sites – sites that enable groups of people to upload and download documents, assign tasks, share events, and use workflows – but it doesn't have enough features to build a corporate intranet, provide a corporate-wide search facility, or let employees build their own personal sites for storing their own documents. You need a version of SharePoint Server or Office 365 Midsized Business or Enterprise E3 for these features.

So as you are working your way through this course, be aware that your SharePoint site may look totally different to our samples and that you may or may not have access to the features to which we refer.

SHAREPOINT SITES

A SharePoint *site* is a specialised website used to gather, organise, and present the information you put into SharePoint. Whenever you create a site in SharePoint Online, an Office 365 group is created by default. SharePoint sites comprise pages that act as repositories for information and content

Sites

SharePoint sites are different in structure to typical internet websites. Internet websites comprise linked pages, while SharePoint sites comprise pages that act as repositories for information and content. SharePoint sites store this information and content in special containers (or *apps*) known as *lists* and *document libraries* (you'll learn about these SharePoint elements later in this chapter). Multiple subsites can also be created under a site.

SharePoint lets you create many types of sites (as long as you have the correct permissions and depending upon the version of SharePoint you are using) based on its various templates. Examples of some of the common sites used for collaboration include:

- *Team Site* – only the members of the team can sign into this private website and use it to collaborate, organise, create and share information and documents. A default team site includes a shared document library, a newsfeed, a site assets library and a wiki library
- *Blog* – a site in which a user or group of users write opinions and share information
- *Project Site* – a site used for managing and collaborating on a project.

The structure of the SharePoint sites created for users in an organisation will vary enormously. With that said, however, most larger companies will create team sites for their various departments and teams.

Office 365 Groups

Whenever you create a site in SharePoint Online, an Office 365 group for the site is created. You can use this group to collaborate with colleagues, and are provided with a shared Outlook inbox and calendar.
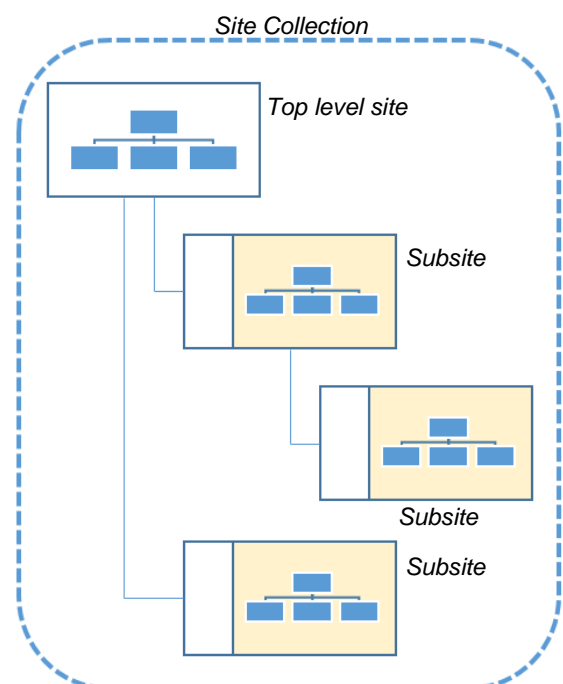
Personal Sites

SharePoint Server has personal sites, however SharePoint Online as part of Office 365 has Delve. You can use Delve as a way of sharing your contact details and other information with your colleagues on Office 365. You can include a picture of yourself, professional information such as your job title and areas of expertise, and personal information such as your birthday. You can choose what information you would like to include in *Me* and specify who can see different types of information; for example, you might like your home phone number to be visible to your immediate work group, but not everybody in your organisation.

Site Collections

Every SharePoint site is part of a *site collection*. A site collection is, just as it sounds, a collection of related sites (as shown to the right). The site at the top of a site collection is known as the top-level or root site – this is the site that was created first. If you then create a site from within the top-level site, such as a team site, this new site will be known as a subsite or child site.

The subsites and top-level site in a site collection are linked, which means that site visitors can navigate between the sites (if they have the appropriate permission). The sites may also share attributes such as security, but they will contain different content such as pages, lists and libraries.

Although you can create as many subsites as desired in the one site collection, it's better not to; otherwise, site navigation and management may become very difficult. Instead, if you are part of a large organisation, your site collection will be probably just one of many site collections which form part of a larger corporate portal site – commonly, large organisations will create a site collection per department (e.g., Operations, Sales).

Site Collection

Top level site

Subsite

Subsite

Subsite

TEAM SITES

SharePoint offers a vast variety of built-in site templates. However, the most commonly used site template is the ***Team Site*** template. This template is used to create ***team sites*** which are the sites that are mainly used by teams of people to collaborate, organise, create and share documents. You will be using a team site for the rest of this course so we'll describe them here in more detail.

What Is A SharePoint Team Site?

A SharePoint team site:

- is a *private website* that provides a central storage and collaboration space for documents, information and ideas for team members only. Other employees within the organisation, but outside the team, and people outside the organisation cannot access a team site.

- provides a *storage container* for the team's work. When a team member is ready to save a document that is relevant to the team, they would save it in a document library in the team site. All other non-relevant documents would be saved to a different location, outside the team site.

- has *apps* to help a team stay organised. For instance, you can use *lists* to display information pertinent to the team (such as an announcements list to broadcast key information, new tools or resources to team members or a links list to help your team find key information for their jobs), *document libraries* for storing documents that the team can collaborate on, and *timelines*.

- supports *social networking* both within the team and outside of the team, but within the site collection in which your team site is found.

- provides a space for team members to *collaborate* on *documents* (as a result of a team site's social networking capabilities). You can share documents with the whole team by posting them on the team site rather than having to email them to your colleagues. You and other team members can then edit the documents either at the same time or individually at different times.

- provides a space for *team conversation* (as a result of a team site's social networking capabilities). Team members can see who is online, and start or participate in a conversation for the team around an issue that you are trying to resolve.

- enables *automation* for a team's *workflow*. For example, a document may need to go through several steps of approval from different people in the team before it can be considered to be final. By creating a workflow and attaching it to the document, the document will pass automatically to the required people after being approved.

- allows you to use forms to collect information, such as surveys.

- is *secured* by *permissions*. For example, the site's administrator will determine who is a member of the team and what role each member has in a team – such as a contributor, editor, owner etc. They can also add new members as the team grows and delete members as they become redundant.
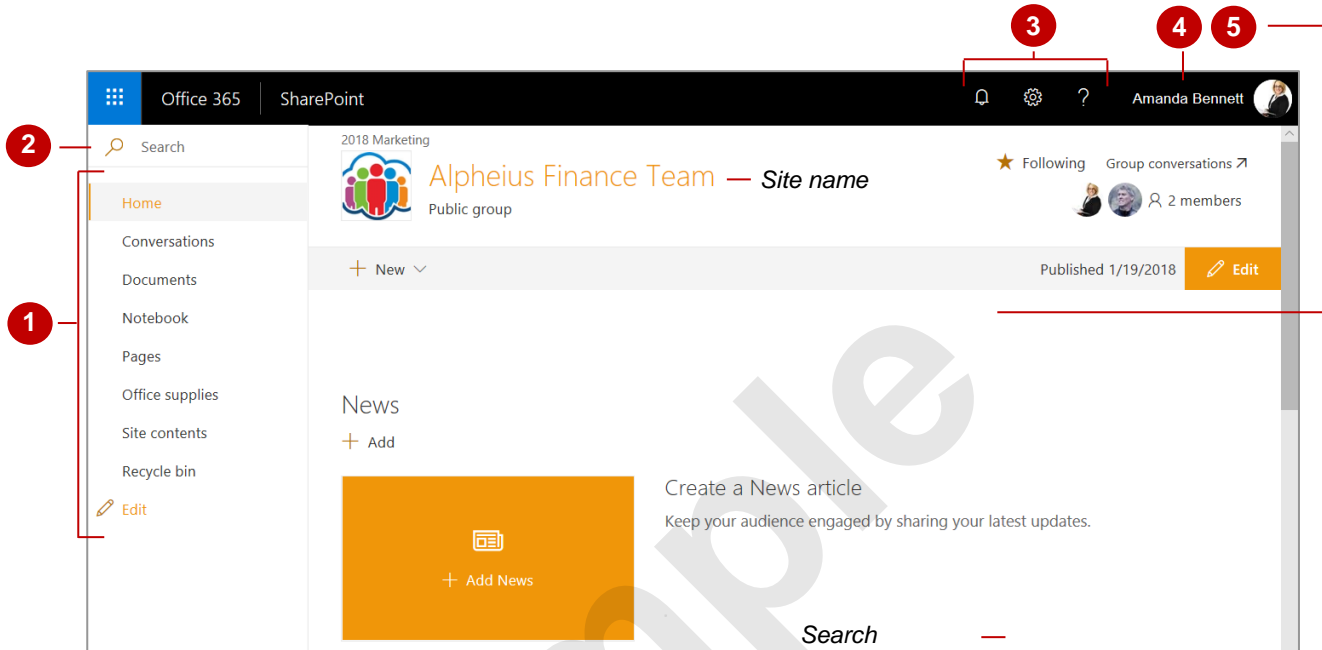
How Can A SharePoint Site Help You?

A SharePoint site helps groups of people share information and work together. For example, a SharePoint team site can help you:

- coordinate projects, calendars and schedules

- discuss ideas and review documents or proposals

- share information and keep in touch with other people

- document your team communications

- access training resources

- make announcements

- share schedules

- facilitate team discussions.

CORE ELEMENTS OF A SHAREPOINT SITE

All SharePoint sites are created from a template that best suits a particular business purpose. But regardless of which template is used, all sites tend to comprise the same basic elements. Here we look at one of the most commonly-used sites in SharePoint – the team site – to describe the core elements. Once you know how to use a team site, you can use any SharePoint site.

1	***The Quick Launch***	The quick launch (also known as the left navigation bar) provides clickable links to content in the current site. This content is usually lists and libraries, such as the ***Documents*** library and ***Office supplies*** list above. See the *Navigating A SharePoint Site* chapter for more information about using the quick launch.
2	***Search***	You can use the ***Search*** bar to search the site for the content you need, such as files and subsites.
3	***Notifications/Settings/Help***	From left to right the icons that appear here are ***Notifications***, ***Settings*** and ***Help***. Clicking on ***Notifications*** displays the ***Notifications*** pane which lists recent activity in the SharePoint site. Clicking on ***Settings*** displays a menu that provides options for adding pages, modifying site permissions, and more. Clicking on the ***Help*** icon displays the ***SharePoint Help*** pane where you can quickly search for help.
4	***Your Name***	Click on your name to display the ***My accounts*** pane where you can access your Delve profile or your account, or you can choose to sign out.
5	***Main Area***	This area displays the content in the selected page, such as the home page in our example above, a list of documents stored in document library, a calendar in a calendar list, and so on. You can add content to the site by clicking on ***New*** and selecting the required option, or edit the layout of the site by clicking on ***Edit***.

SHAREPOINT APPS

New to SharePoint 2016 is the concept of *SharePoint apps*. Microsoft defines apps as small, easy-to-use, stand-alone applications that can be added to a site to provide capabilities within the SharePoint site, such as solving a specific end-user or business need. These apps include all lists and libraries in a site, as well as those bought online or built by developers.

Apps – The Basics

You can think of apps for SharePoint in a similar way as you might think of apps for your phone or tablet. Just like a phone or tablet app (such as a game or banking app), SharePoint apps are small, standalone applications that perform a specific task or meet a particular business need. They are also very easy to install, use, manage, upgrade and remove.
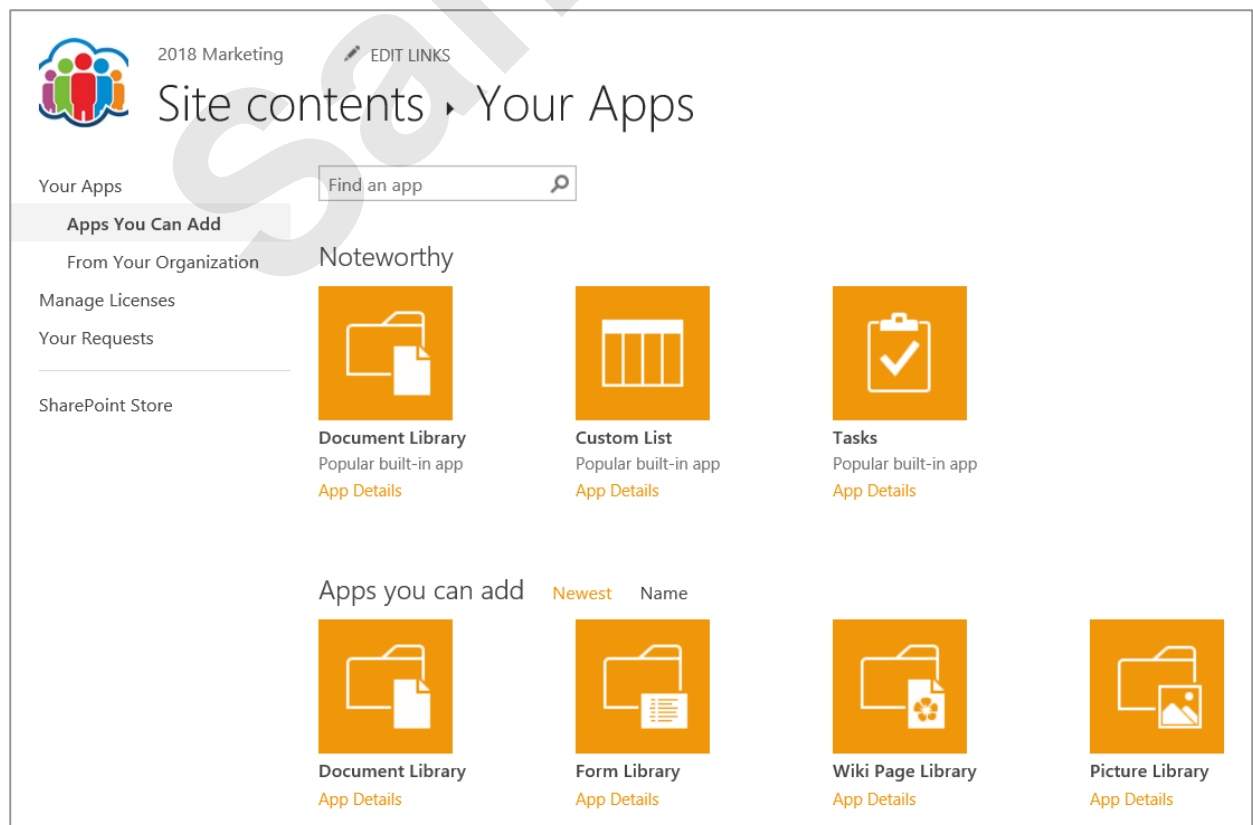
For instance, you might have an app on your phone that provides weather information; likewise, you could install a SharePoint app on your site that will display the weather for the user's location. Examples of other apps that you might add to your site could include Facebook integration, world clock, corporate news, event planning, shopping cart, and more.

By adding apps to your site, you can customise it with specific functionality or to display particular information thereby enhancing its capabilities.

What Are Apps?

In addition to the standalone apps described above, this all-encompassing term – *app* – covers anything from the template on which a SharePoint site is based, the lists and libraries, and the web parts in a page.

By default, the only apps initially available within SharePoint are the default list and library templates available on the *Your Apps* page, as shown below. However, your organisation can purchase apps from the online *SharePoint Store* hosted by Microsoft (which you can access via the *SharePoint Store* link in the quick launch on this page). Alternatively, developers in your organisation could build them and deploy them to your site to provide additional functionality.
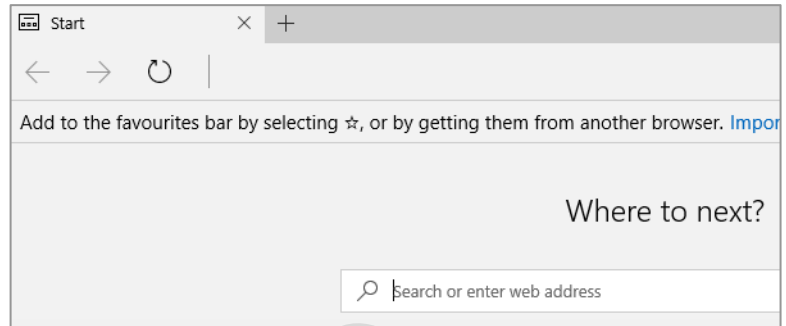
ACCESSING SHAREPOINT ONLINE

To access SharePoint Online, you must use an internet browser application and Office 365. This is necessary as SharePoint Online is a service that is offered as part of Office 365. You must have log in details for Office 365 in order to access SharePoint Online – if you don't, ask your administrator to email you the details you will need to sign in.
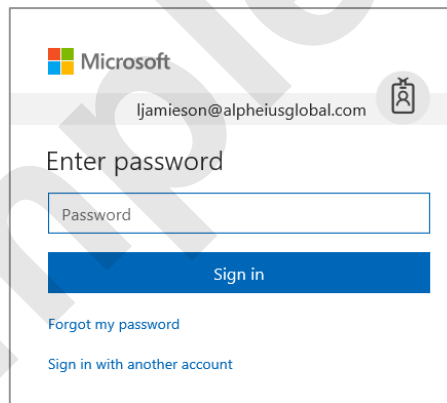
Try This Yourself:

Before starting this exercise, ensure that your computer is switched on and connected to the internet...

1 Open your internet browser

We're using Microsoft Edge but you can use another browser, such as Chrome. Before you can open a SharePoint site, you must get the URL for the team site from your instructor...

2 Navigate to **www.office.com**, then click on **[Sign in]** to display the sign in page

It may appear differently depending on whether you have signed in before or not…

3 Type the email address and associated password for your Office 365 account, then click on **[Sign in]**

4 Under **Apps** click on **SharePoint** to display the main SharePoint page

Depending on whether you have accessed sites before or not, your page may appear very differently
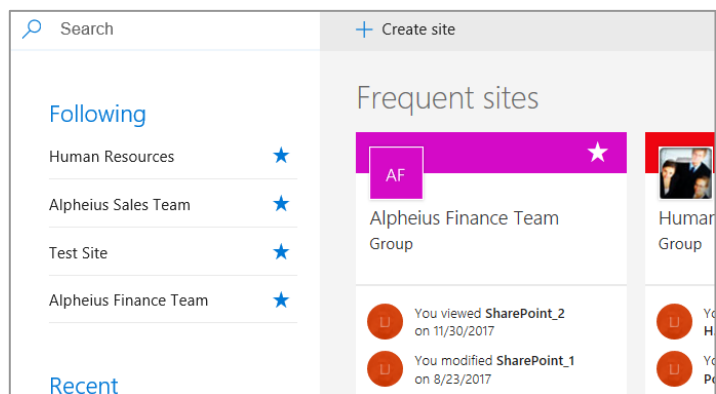

For Your Reference…

To **access SharePoint Online**:

1. Open an internet browser
2. Navigate to Office 365 and sign in
3. Under **Apps**, click on **SharePoint**

Handy to Know…

- If you don't have access to a particular SharePoint site, the Access Denied page will display informing you of this. If this occurs, you will need to contact the site manager and request that they grant you permission to access the site.
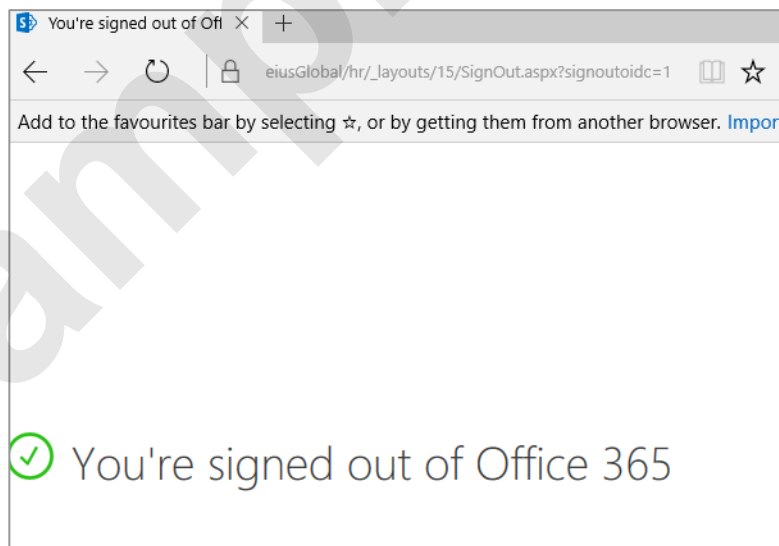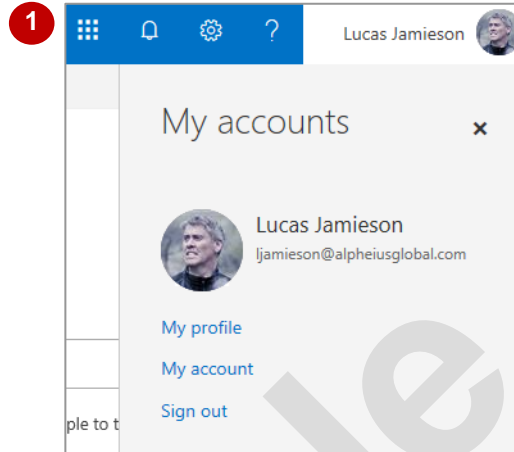
SIGNING OUT OF SHAREPOINT

You should sign out of your SharePoint site when you have finished using SharePoint for the day or if you have signed in on someone else's computer. Signing out of SharePoint is easy – simply select the **Sign Out** command from the menu which you can display from any page by clicking on your name.

Try This Yourself:

Before starting this exercise ensure that you are signed in to your team site…

1. Click on the name that appears near the top right corner of the SharePoint window to display a menu of options, as shown

2. Select **Sign Out** to sign out of Office 365

For Your Reference…

To *sign out* of *SharePoint*:

1. Click on the name in the top right corner of the window
2. Select **Sign Out**
3. Close the browser tab or window, if necessary

Handy to Know…

- There is not necessarily any need to sign out of a site before leaving SharePoint. However, if you are using a computer in a public place, it is a really good idea to sign out.

CHAPTER 2 INFOCUS

CREATING TEAM SITES

If you are a site manager, you will probably want to create team sites. In this chapter, you will create a team site and modify how it looks.

The skills you learn in this chapter can be applied to any SharePoint sites that you create at a later date.

In this session you will:

✓ gain an understanding of sites and site collections
✓ gain an understanding of creating sites
✓ learn how to create a team subsite
✓ learn how to quickly change the theme
✓ learn how to change the logo
✓ gain an understanding of the options found on the *Change The Look* page
✓ learn how to change the look of a site.

SITES AND SITE COLLECTIONS

A site collection is a container that holds sites and every SharePoint site is part of a site collection. At the top of a site collection there is usually a team site, and all other sites (known as subsites) in the collection fall under this top-level site.

One Or More Site Collections?

Smaller organisations may have only one site collection, while larger organisations, or those with clear delineation between their groups or departments, might have more than one site collection.

If your company comprises several different business areas (such as Sales, Manufacturing and Operations), your SharePoint administrator might create separate site collections, one for each department. They would do this if the vast majority of the people in each department worked only with the information on their own site, and never with the information in the other departments' sites.

If there is a large overlap in business between each department, the SharePoint administrator would create one site collection so that the users can share information. Each department would have their own subsite in this site collection.

Benefits For Multiple Site Collections

There are several benefits for utilising multiple site collections:

- Multiple site collections enable the company to set a unified focus. You can have groups of settings specific to each department, such as Manufacturing, Sales, and so on.

- You can produce dedicated reports for each group. When you report on an entire site, the results won't include other departments' information.

- When you are managing just a few sites in a site collection, this is fairly easy to do. As the number of sites grows and their complexity increases, so too will your administrative tasks. For example, you might need to add new users, create new sites, train users, check workflow logs, and so on. By creating multiple site collections, you can have a different administrator for managing each collection.

- Security within a site collection is inherited. This means that you can cascade user permissions down from the top-level site in a collection to each subsite as you create it. This is a huge advantage if you have many different types of security at the highest level. However, if you have different groups of users who require different permissions within the site collection, you will not be able to utilise the power of security inheritance.

UNDERSTANDING CREATING SITES

When you create a site in SharePoint Online you have the option to create a *Team* site or a *Communication* site. Once you have created a site, you also have the ability to create *subsites* within the site. The type of site you choose to create will depend on your needs; however, for the purposes of this manual we will only be creating a *Team* site.
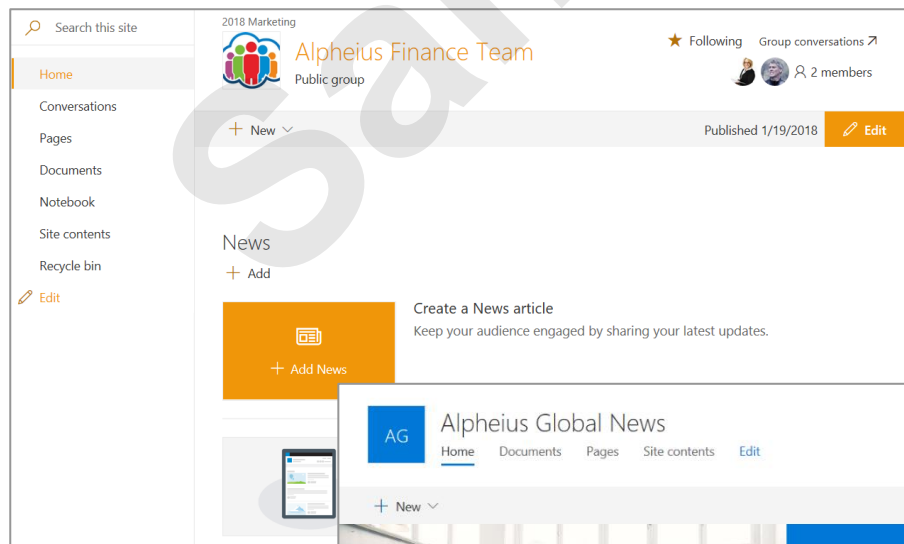

Team Sites

A *Team* site provides a common area where you and members of your team can work collaboratively. It includes a document library, a notebook, and web parts that you can use to customise the site for your specific needs. When you create a team site, an Office 365 group is automatically created which any users of the site can also access. Typically, a team site will have many editors and selected readers, and be used in situations where several people need to communicate and work collaboratively, such as if they work in the same department or on the same project.

Communication Sites

A *Communication* site is designed to share information rather than to collaborate with others. It is still customisable in the same way that a team site is, but there are more layout options available in the initial creation stage. Typically, a communication site will only have a few editors and many readers, and be used in situations where information needs to be accessible to a large number of people – for example, an organisation-wide news site.
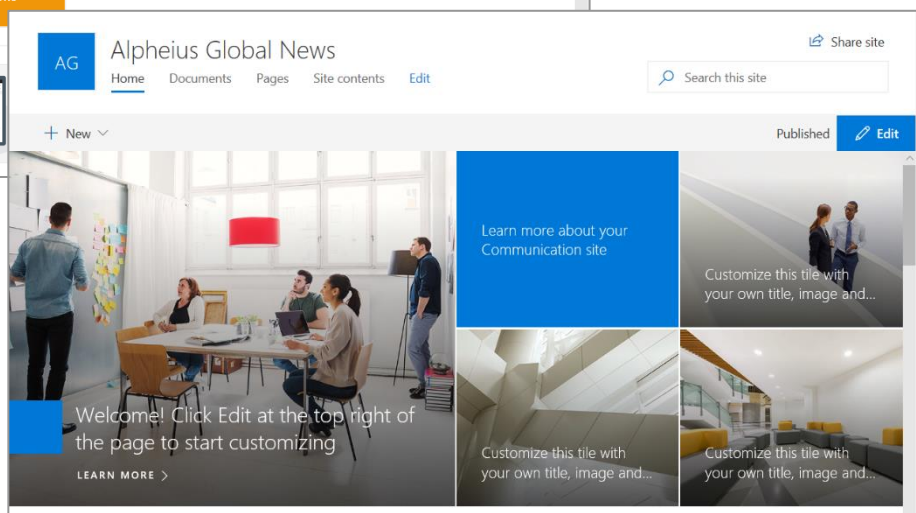
Subsites

A subsite is a site that is linked to a team or communication site. For example, you may create a team site for your organisation, then you may decide you wish to create a subsite for the marketing department or the I.T department. You can create subsites based on three templates: *team site*, *project site*, or *blog*. A team site subsite is the same as a team site that is not a subsite and has the same purpose and functionality. A project site is designed to work on specific projects, while a blog site allows you to use and manage a blog.

A team site allows groups of people to communicate and collaborate with each other

A communication site is designed to share information with a large number of people

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CREATING A TEAM SITE

You can create a new site either for yourself or to share with others in a group or general members of your workplace. A site is a handy way of keeping related information together such as documents and links to related websites. It is also a great place to discuss ideas about a particular project that you all may be working on.

Try This Yourself:

Open Site

Before starting this exercise ensure you are signed in to Office 365…

1 Click on the app launcher in the navigation bar, click on the **SharePoint** tile, then click on **Create site** as shown to display the **Create a site…** pane

2 Click on **Team site** to select this option and display the next page

3 Type **Alpheius Finance Team** in **Site name**

We'll leave the default settings as they are for the moment…

4 Click on **[Next]**

You could add owners or members here now, but we will do it later…

5 Click on **[Finish]** to create the new site

You may have to wait a few moments.

Leave this page open for the next exercise

1
Search + Create site

Following

Human Resources ★
Alpheius Sales Team ★
Test Site ★

Frequent sites

AF ★

Alpheius Finance Team
Group

3
Site name

Alpheius Finance Team ✕

The site name is available.

Group email address

AlpheiusFinanceTeam ✎

The group alias is available.

Site Address

https://watpub.sharepoint.com/sites/AlpheiusFinanceTeam

4
AF Alpheius Finance Team
Public group

Who do you want to add?
You can also add more people later

Add additional owners

Enter a name or email address

5
Office 365 | SharePoint

Search

Home
Conversations
Documents
Notebook
Pages
Site contents

AF Alpheius Finance Team
Public group

+ New ⌄

News
+ Add

For Your Reference…

To **create** a **new site**:

1. Click on the app launcher in the navigation bar, then click on the **SharePoint** tile
2. Click on **Create site**
3. Type a name, click on **[Next]**, then click on **[Finish]**

Handy to Know…

- SharePoint Online provides you with the option to create a news post. To do so, simply click on **create news post** on the SharePoint home page, then select the site you wish to create the news post for. A new page will be created in the selected site that you can then publish.