



Trinity College Dublin

Coláiste na Tríonóide, Baile Átha Cliath

The University of Dublin

SharePoint Training

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1. OneDrive

OneDrive is the Microsoft cloud service that connects you to all your files. It lets you store and protect your files, share them with others, and get to them from anywhere on all your devices. **All files that you store in OneDrive for Business are private unless you decide to share them.** You can share files and folders with co-workers so you can collaborate on projects.

1.1. How is OneDrive for Business different from OneDrive?

OneDrive is online personal storage that you get when you set up a Microsoft account to use services such as Outlook.com or Xbox. Use OneDrive to save documents, photos, and other files in the cloud, share them with friends, and even collaborate on content. When you subscribe to Microsoft 365, you get 1 TB of storage and premium OneDrive features.

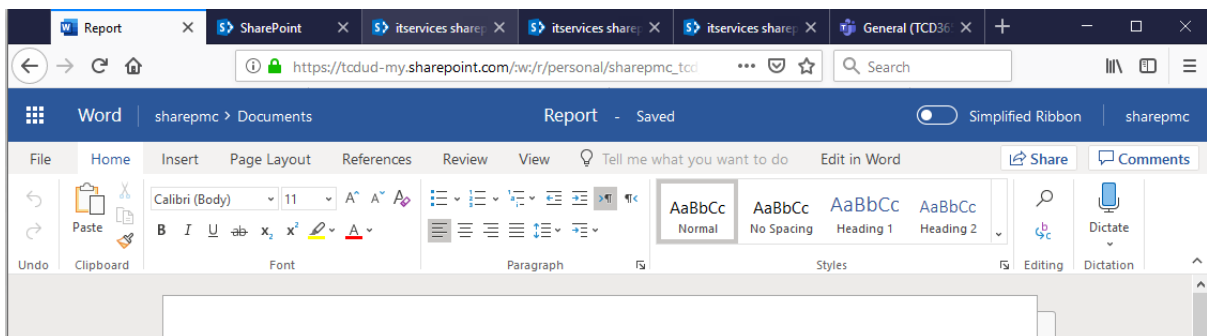
OneDrive for Business is online storage for work. Your OneDrive for Business is managed by TCD and lets you share and collaborate on work documents with co-workers.

1.2. Online Apps

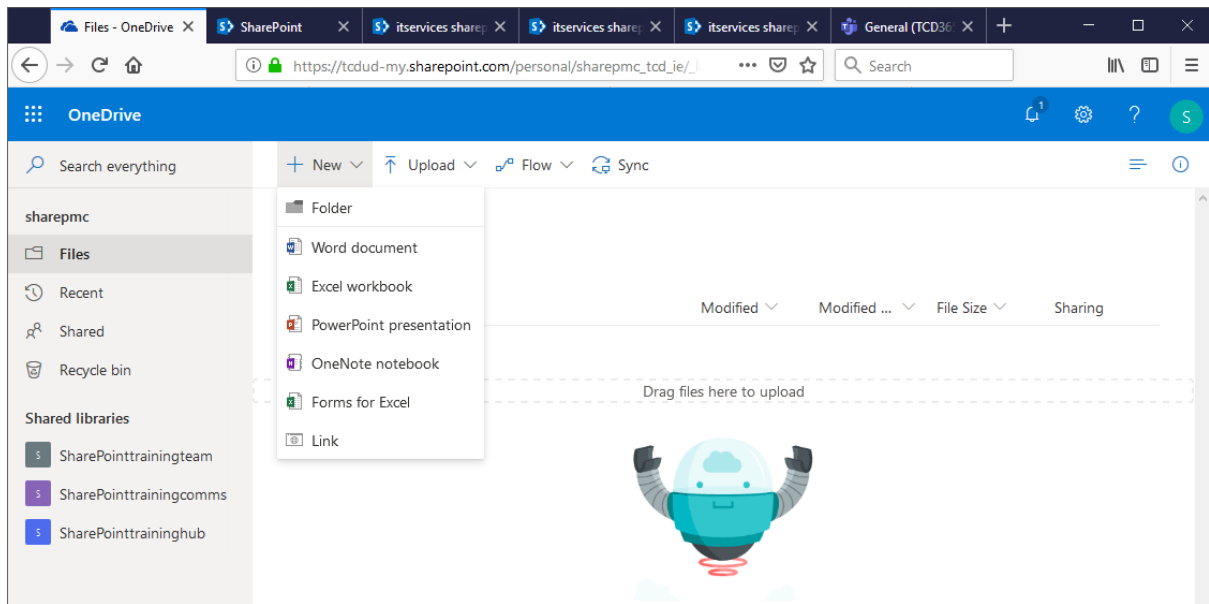
Microsoft Online lets you view and edit documents stored in your OneDrive directly from your web browser. Microsoft Online gives you the **full functionality of editing** without having to start up an Microsoft program.

To get started, go to [OneDrive.com](https://onedrive.com), sign in, and click **Upload**. Pick documents that you want to be able to share easily, or be able to access on any computer.

When you can see the document on OneDrive, click it. It opens in an Microsoft Online program, such as Word Online. The document opens to *Edit* mode by default and changes save automatically. To close the document and go back to your file list, click one of the breadcrumb links at the top of the page.



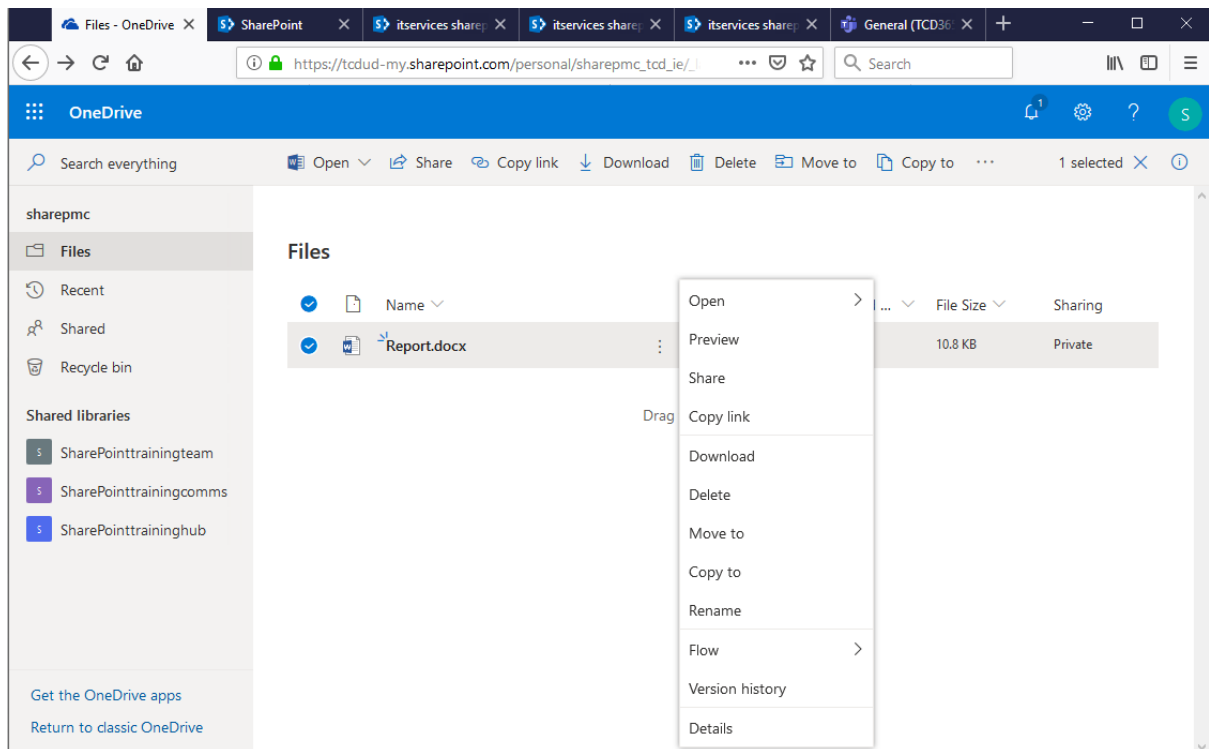
You can also create a document right from OneDrive by clicking **New** and then the name of the type of document you want to create.

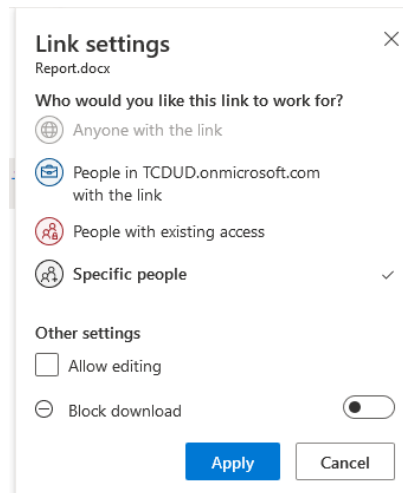


1.3. Sharing a file in OneDrive

After you sign in with your work account on the [OneDrive website](#), here's how you share files or folders:

1. Go to the [OneDrive website](#) and sign in with your work account.
2. Select the file or folder you want to share, and then select **Share**.





3. Enter the names of the people or groups you want to share the file or folder with. You also have the option to add a message.

Optional: Click the dropdown list to change the type of link. The Details pane opens, where you can change who can access the link and whether people can edit the item you're sharing.

Options for **Who would you like this link to work for** (options vary based on admin settings):

- **People in TCD** gives everyone in your organization access to the link, whether they receive it directly from you or forwarded from someone else.
- **People with existing access** can be used by people who already have access to the document or folder. It does not change the permissions on the item. Use this if you just want to send a link to somebody who already has access.
- **Specific people** gives access only to the people you specify, although other people may already have access. If people forward the sharing invitation, only people who already have access to the item will be able to use the link.

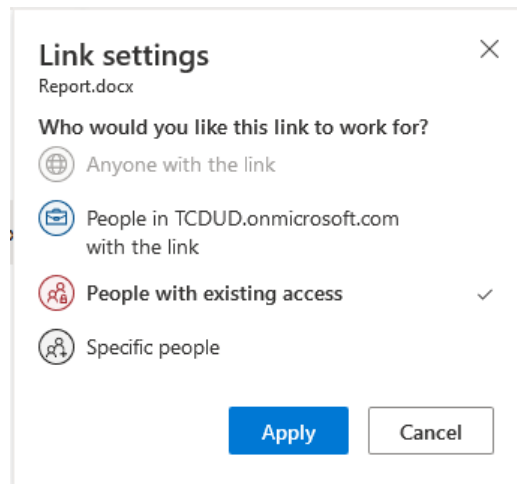
When you're done, click **Apply**.

4. When you're ready to send the link, click **Send**.

1.4. Get a link to a file or folder that you can copy

Another way to share is to get a link to a file or folder that you can copy and paste in a text message or on a website. People you share these links with can also forward your link to others.

1. In your OneDrive, click **Copy link**. The link is automatically copied to your clipboard.



Optional: Click the dropdown list to change the type of link. The Details pane opens, where you can change who can access the link and whether people can edit the item you're sharing.

Options for **Who would you like this link to work for** (options vary based on admin settings):

- **People in TCD** gives everyone in your organization access to the link, whether they receive it directly from you or forwarded from someone else.
- **People with existing access** can be used by people who already have access to the document or folder. It does not change the permissions on the item. Use this if you just want to send a link to somebody who already has access.
- **Specific people** gives access only to the people you specify, although other people may already have access. If people forward the sharing invitation, only people who already have access to the item will be able to use the link.

When you're done, click **Apply**.

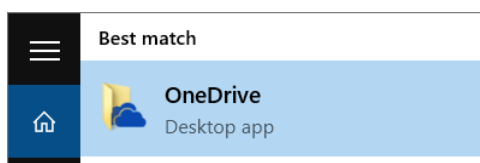
2. Paste the link (Ctrl+V) to wherever you want, such as a text message or on a website.

1.5. Syncing files with the OneDrive sync client

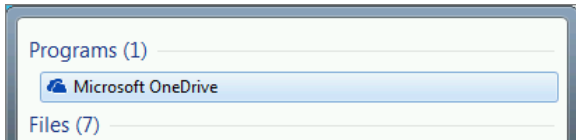
With OneDrive, you can sync files between your computer and the cloud, so you can get to your files from anywhere. You can work with your synced files directly in File Explorer and access your files even when you're offline. Whenever you're online, any changes that you or others make will sync automatically.

1. Select the **Start** button, search for "OneDrive", and then open it:

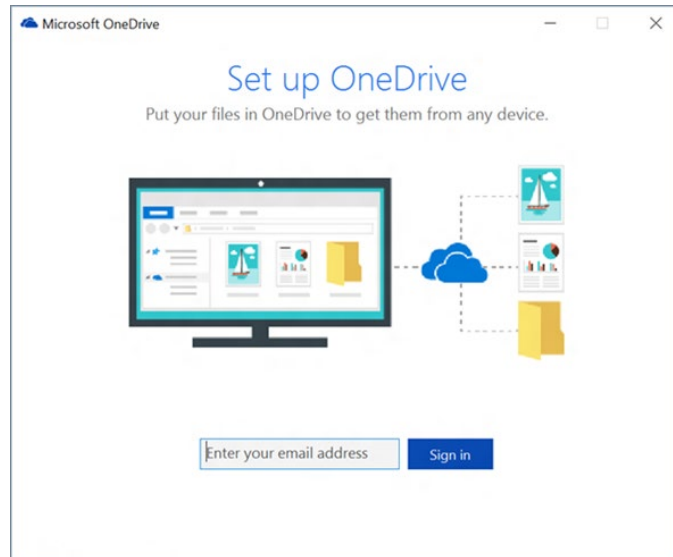
- In Windows 10, select the **OneDrive** desktop app.



- In Windows 7, under **Programs**, select **Microsoft OneDrive**.



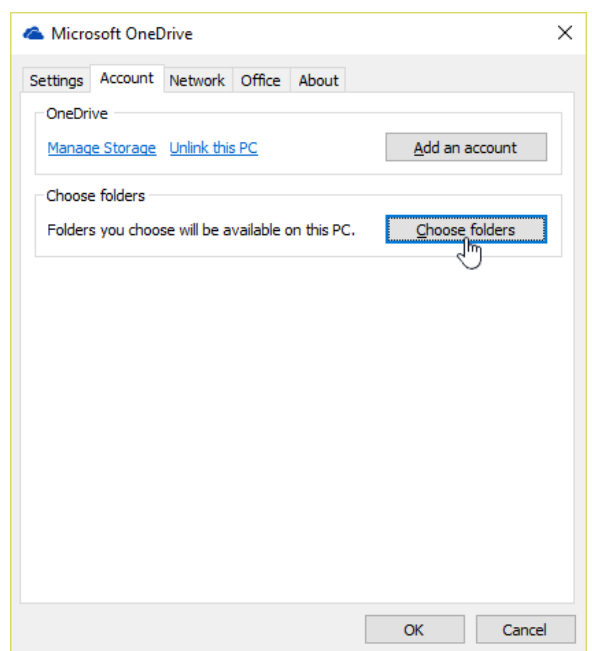
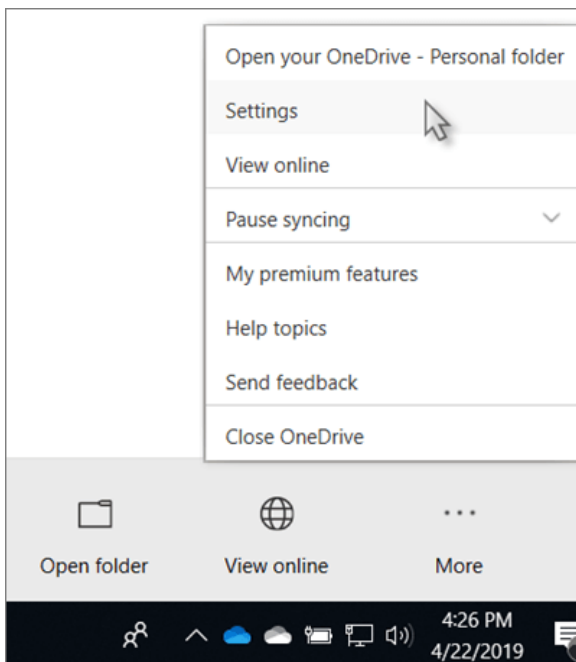
- In Windows 8.1, search for **OneDrive for Business**, and then select the **OneDrive for Business** app.
2. When OneDrive Setup starts, enter your TCD account, and then select **Sign in**.



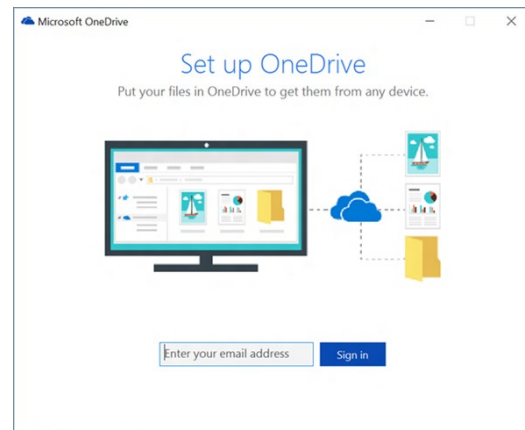
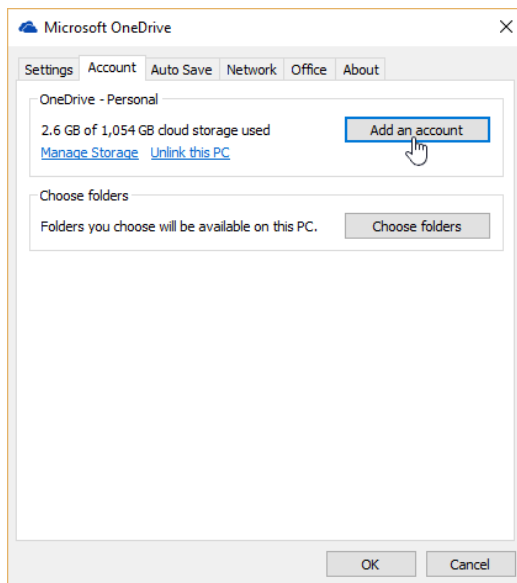
3. Select the white or blue OneDrive cloud icon in the Windows taskbar notification area.



4. Select **More > Settings**.

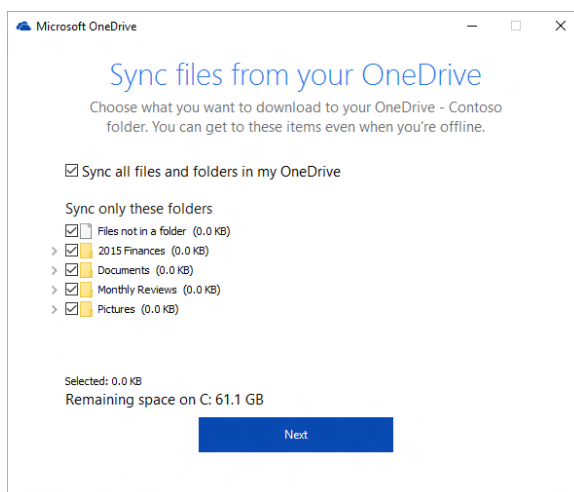


5. In **Settings**, select **Account**, and then select **Add an account**.



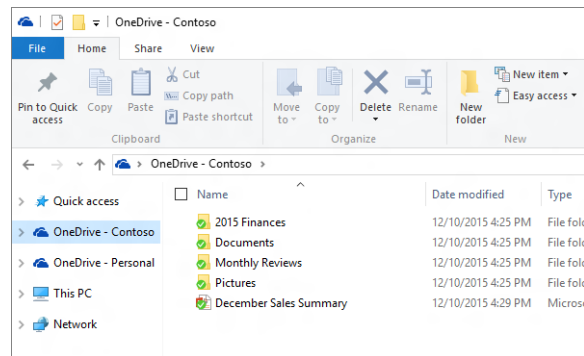
When OneDrive Setup starts, enter your new account, and then select **Sign in**.

On the **Sync files from your OneDrive** screen, choose the folders you want to sync, and select **Next**. This helps control the amount of space OneDrive files take on your computer and conserves bandwidth during sync processes. You can change this later in Settings, but this is a good opportunity as well.



1.6. See and manage your OneDrive files

Your OneDrive files will appear in File Explorer in the **OneDrive** folder. If you use more than one account, your personal files appear under **OneDrive – Personal** and your work or school files appear under **OneDrive - TCD**.



You now have a new white or blue cloud icon (or both) in your notification area and your files are synced to your computer. Your blue cloud icon will appear as OneDrive – TCD when you hover over the icon.

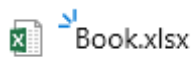
Any time you want to change the folders you sync on your computer, right-click that cloud icon in the taskbar notification area, and select **Settings > Account > Choose folders**. Find other information about your account and change other OneDrive settings from here.

1.7. The Status Column in OneDrive

What do the OneDrive icons mean?

The OneDrive icons in the notification area and File Explorer tell you the sync state of the file or folder.

Three little blue lines



The glimmer marks (three little blue lines) seen next to a file or folder indicate that the file is new. You'll see this only when using OneDrive.com online.

Red circle with white cross



A red circle with a white cross means that a file or folder cannot be synced. You'll see this in File Explorer or on the OneDrive notification area icons.



Click the blue or white OneDrive icon in the notification area to learn more about the problem.




For more help, read how to [Fix OneDrive sync problems](#).

Gray OneDrive icon



A grayed-out OneDrive icon in the taskbar means you're not signed in, or OneDrive setup hasn't completed.

Press , search for **OneDrive** and then open the **OneDrive desktop app**.

OneDrive paused icon



The paused symbol over the OneDrive or OneDrive for Business icon means your files are not currently syncing.



To resume syncing, select the blue or white OneDrive icon in the notification area, select **More** and then **Resume syncing**.

Learn more about [How to Pause and Resume sync in OneDrive](#).

OneDrive icon with sync arrows



The circular arrows over the OneDrive or OneDrive for Business notification icons signify that sync is in progress. This includes when you are uploading files, or OneDrive is syncing new files from the cloud to your PC.



Sync icons may also be seen online in OneDrive.com.



OneDrive will also check for other file or folder changes and may show "Processing changes". If OneDrive shows "Processing changes" for a long time, it could be because you have an online file open, a very large file syncing, a lot of files stuck in a queue. To help resolve these problems, read [OneDrive is stuck on "Processing changes"](#).

People icon next to a file or folder



If you see a "people" icon next to your OneDrive files or folders, this indicates the file or folder has been shared with other people.

Learn more about how to change sharing at [Share OneDrive files and folders](#).

Blue cloud icon



A blue cloud icon next to your OneDrive files or folders indicates that the file is only available online. Online-only files don't take up space on your computer.

You can't open online-only files when your device isn't connected to the Internet. [Learn more about OneDrive Files On-Demand](#)

Green tick icons



When you open an online-only file, it downloads to your device and becomes a *locally available* file. You can open a locally available file anytime, even without Internet access.

If you need more space, you can change the file back to online only. Just right-click the file and select "Free up space."

[Learn more about OneDrive Files On-Demand](#)

Green circle with the white check mark



Files that you mark as "Always keep on this device" have the green circle with the white check mark.

These always available files download to your device and take up space, but they're always there for you even when you're offline.

[Learn more about OneDrive Files On-Demand](#)

Padlock icon



OneDrive will show a padlock icon next to the sync status if the file or folder has settings which prevent it from syncing.

Learn more about [restrictions and limitations when you sync files and folders](#).

2. SharePoint

2.1. SharePoint Hub Site

Hub sites help you organize your intranet. Getting the most value from hub sites requires some up-front planning. Read on to find out more about hub sites and how you can plan for them.

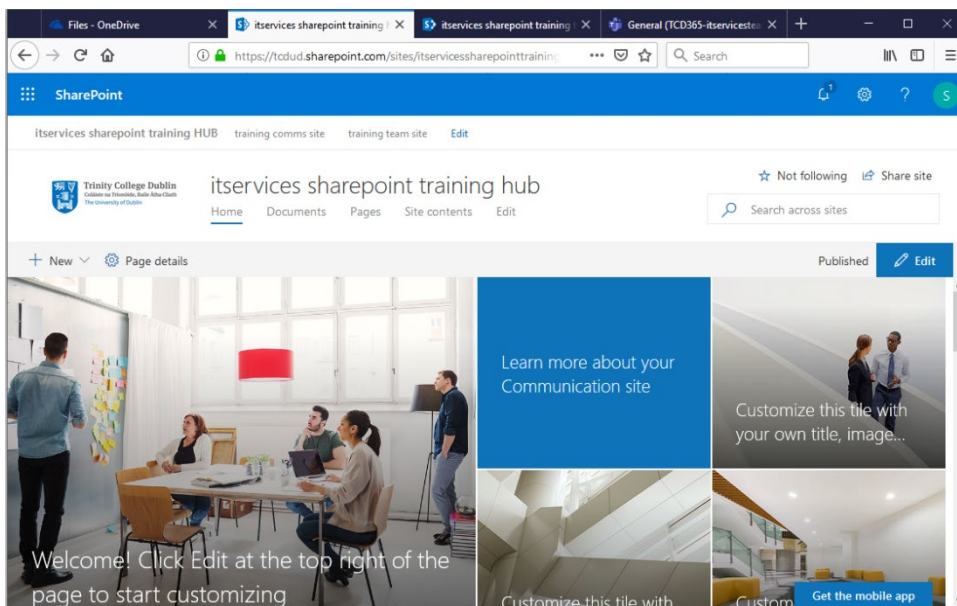
SharePoint hub sites provide an important building block for your intranet. They are the "connective tissue" you use when organizing families of team sites and communication sites together.

One of the key principles of modern intranets based on SharePoint is that each unit of work should get a separate site collection to optimally manage governance and growth over time. Each communication site and Microsoft 365 group-connected team site is created as a site collection that can have its own permissions. A hub site (most commonly created from a communication site) should also be considered its own unit of work that brings together numerous other sites.

2.2. SharePoint Communication Site versus Team Site

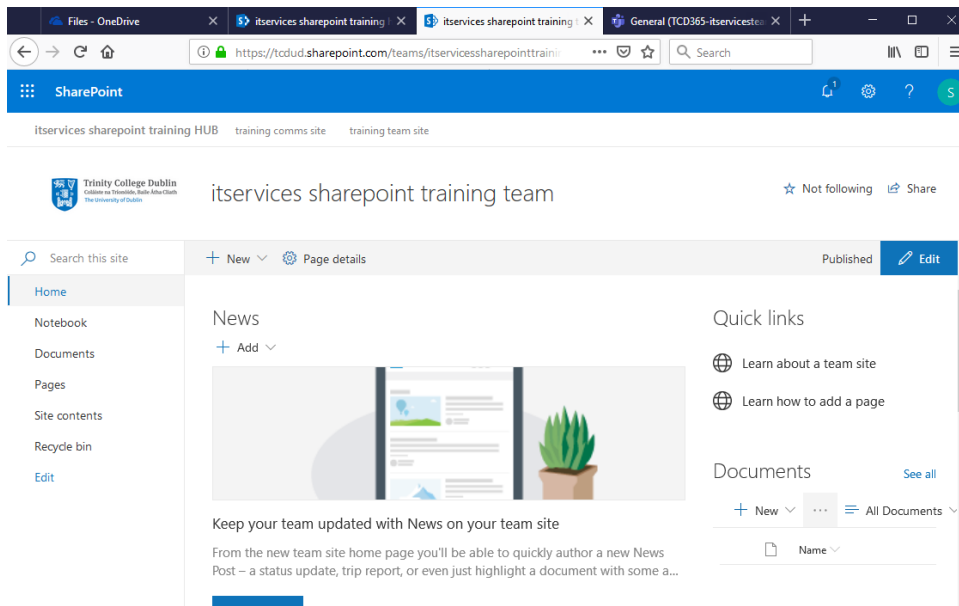
Team sites are focused on collaboration. Communication sites are focused on broadcasting or communicating a message to a wide audience. In a team site, most users contribute content. In a Communication site, typically there are a small number of users and a large number of readers.

SharePoint Communications Site

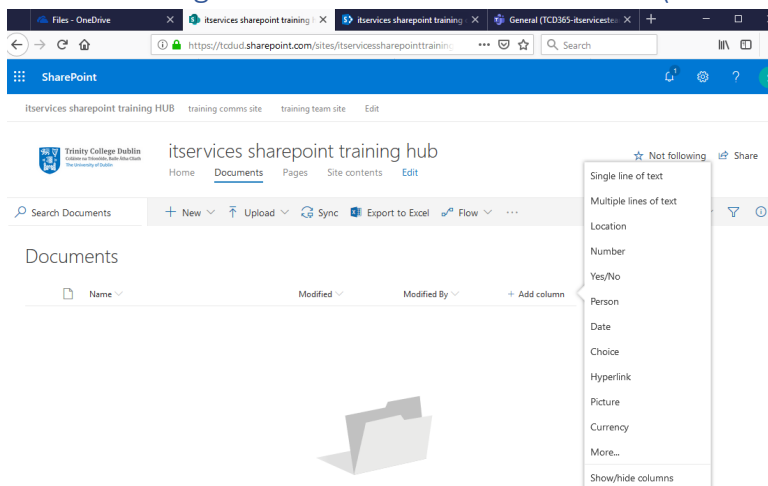


SharePoint Team Site

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2.3. Adding Columns in Document Libraries (Metadata)



Most types of columns can be added without leaving your list or library.

1. Navigate to the list or library you want to create a column in.
2. Select **+ Add column** or **+** to the right of the last column name at the top of the list or library.
3. In the dropdown menu, choose the type of column you want.
4. In the Create a column panel, type a title or column heading into the **Name** field.
5. Enter any other required information. The number of fields will vary with column type you chose. The above example is for a number field.
6. Click **Save**.

✕

Create a column

[Learn more about column creation.](#)

Name *

Description

Type

Single line of text ▾

Default value

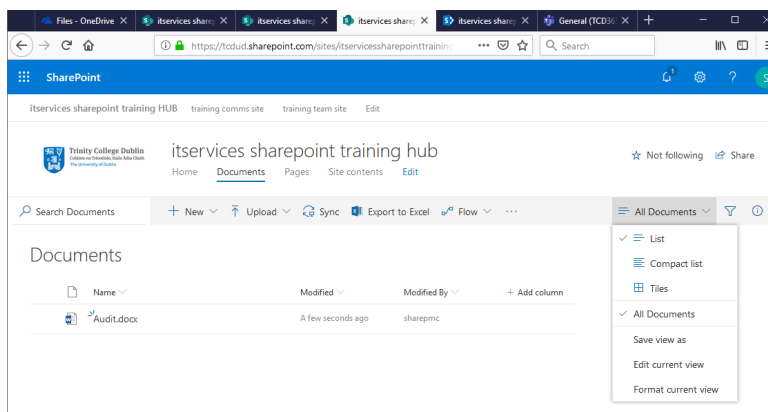
Use calculated value ⓘ

[More options](#)

Save
Cancel

2.4. View the Version column

1. All documents – Edit Current View
2. Select Version



2.5. Version History

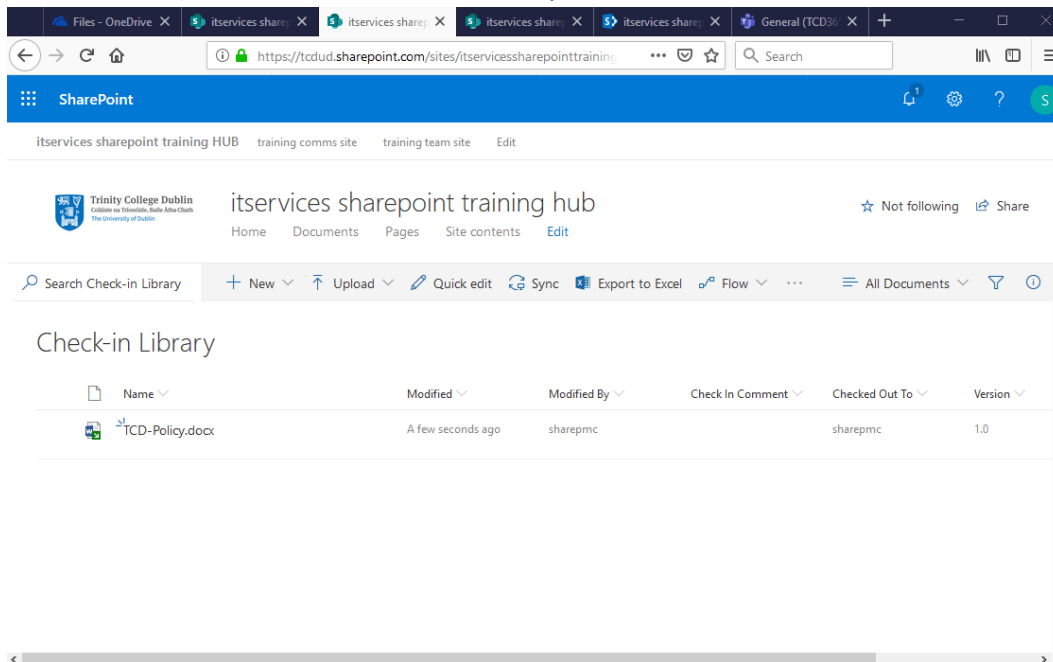
1. Actions – Version History
2. Select the version, and either View, Restore or Delete

Version history ✕

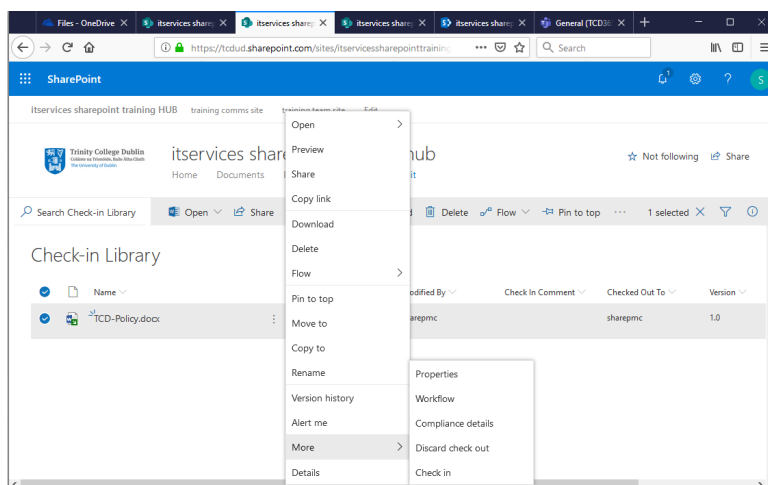
Delete All Versions

No.	Modified	Modified By	Size	Comments
3.0	11/05/2019 09:16	<input type="checkbox"/> sharepmc	18.2 KB	
2.0	11/05/2019 09:15	<input type="checkbox"/> sharepmc	18.2 KB	
1.0	11/05/2019 09:14	<input type="checkbox"/> sharepmc	16.4 KB	

2.6. 'Check in' in a Document Library



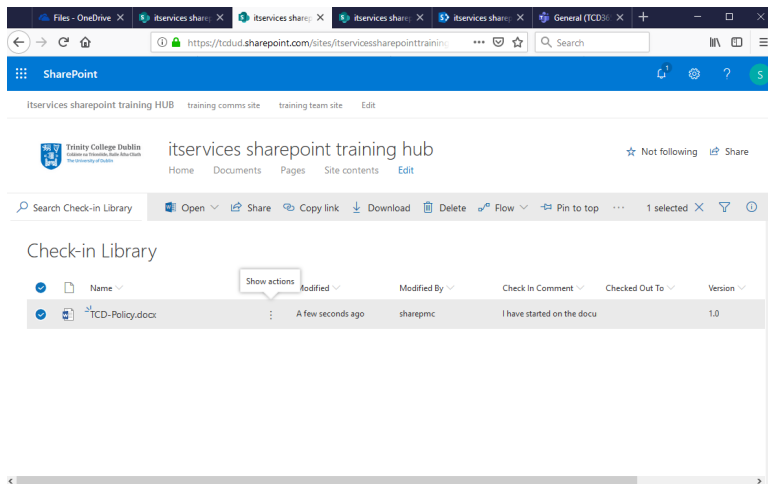
When the file is checked out, the icon next to the file name is partially covered by a green, downward-pointing arrow icon image. This tells you, or anyone else, that the file is checked out. If you point to the icon of any checked-out file, you can see the name of the document and the name of the person who has it checked out.



Your files and any changes you make to them, will not be available to your colleagues until you check the files back into your library.

In the Comments area, add a comment that describes the changes you made. This step is optional but recommended as a best practice. Check-in comments are especially helpful when several people work on a file. Moreover, if versions are being tracked in your organization, the comment becomes part of the version history, which may be important to you in the future, if you need to restore to an earlier version of the file.

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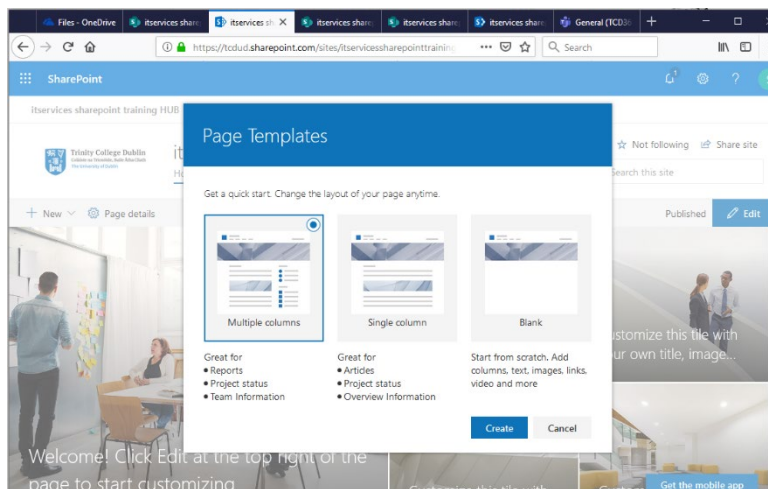


2.7. Adding a page in a SharePoint Communications Site

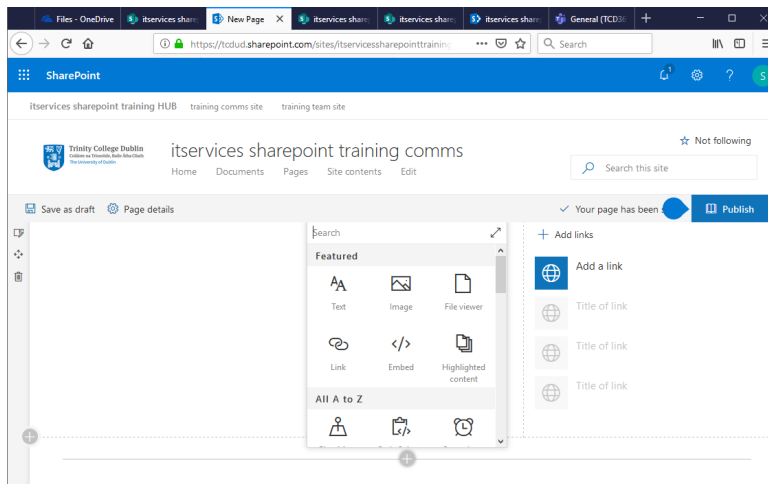
For more detailed information, see:

<https://support.office.com/en-ie/article/create-and-use-modern-pages-on-a-sharepoint-site-b3d46deb-27a6-4b1e-87b8-df851e503dec>

1. Select New – Add a Page
2. Select one of three Page Templates



3. In order to add content (web parts), select the +



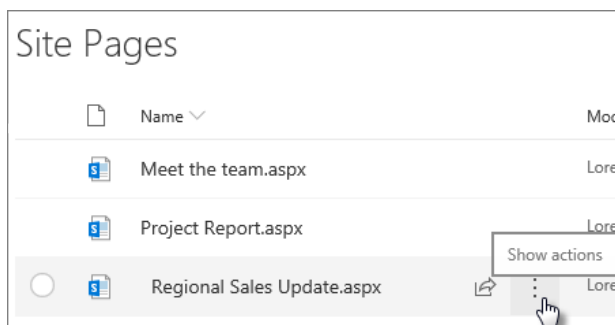
4. When you're done editing, you can click Save as draft to save your changes and close edit mode. Your audience won't see the page until you publish it. Only people with edit permissions on your site will be able to see it.
5. When you are ready for your audience to see the page, click Publish.

2.8. Delete a page

1. Go to the site where your page is.
2. On the left side navigation, click **Pages**.

If you don't see Pages on the left side, click **Site Contents** from **Settings**  in the upper right, then on the left side of the Site Contents page, click **Pages**.

3. Select the page, and then click the ellipses (...) to the right of the selected page.

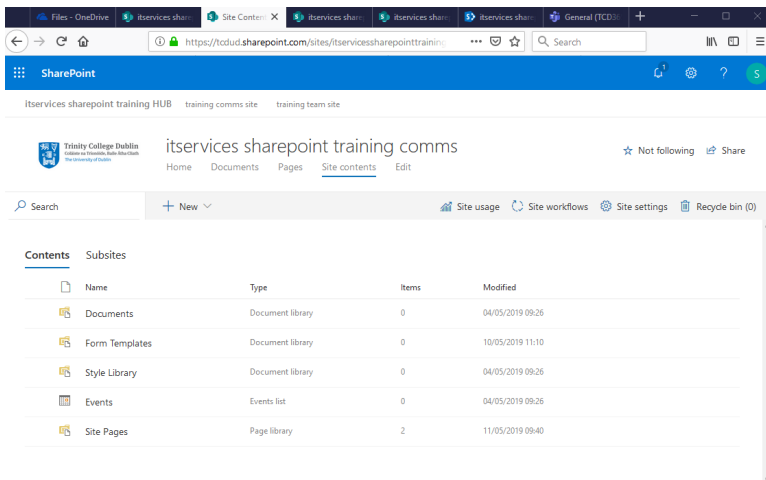


4. Click **Delete**.

2.9. Site Contents

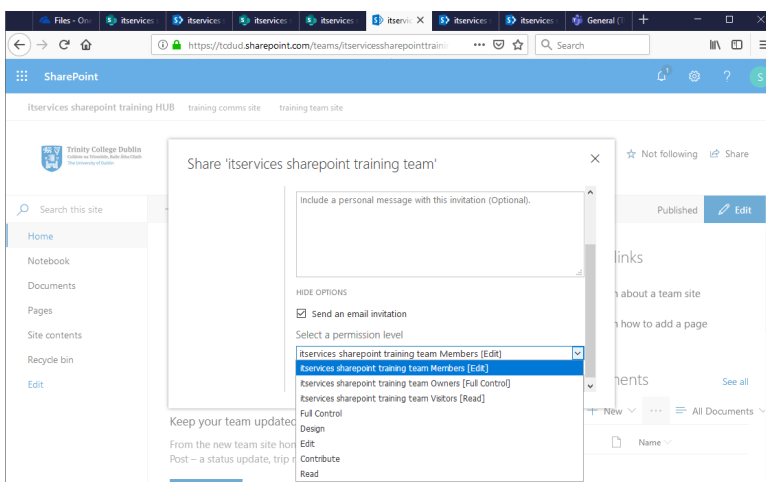
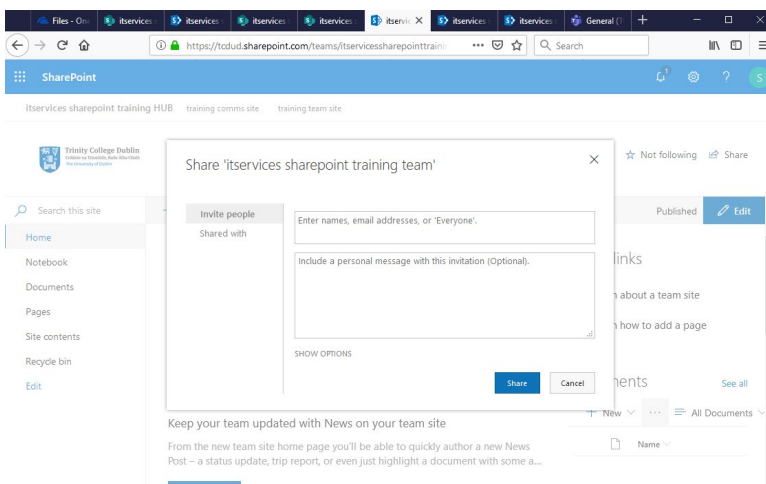
In SharePoint Online site owners can view a list of all pages, libraries, lists, and other apps on their site as well as the list of subsites. The site contents page also provides clearer access to add lists, pages, document libraries, subsites, and apps.

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2.10. Sharing a SharePoint site (Permissions)

1. Select Share
2. Select Options



You have the Read permission level

If you can view the site but not make changes to the site or to the content on it, you belong to the **Visitors** group, which has the **Read** permission level. For example, if you can view a site but cannot edit a document on the site, you have the **Read** permission level.

You have the **Contribute** permission level

If you can view the site and change the content on the site, but not make changes to the site, you belong to **Members** group which has the **Contribute** permission level.

You have the **Full Control** permission level

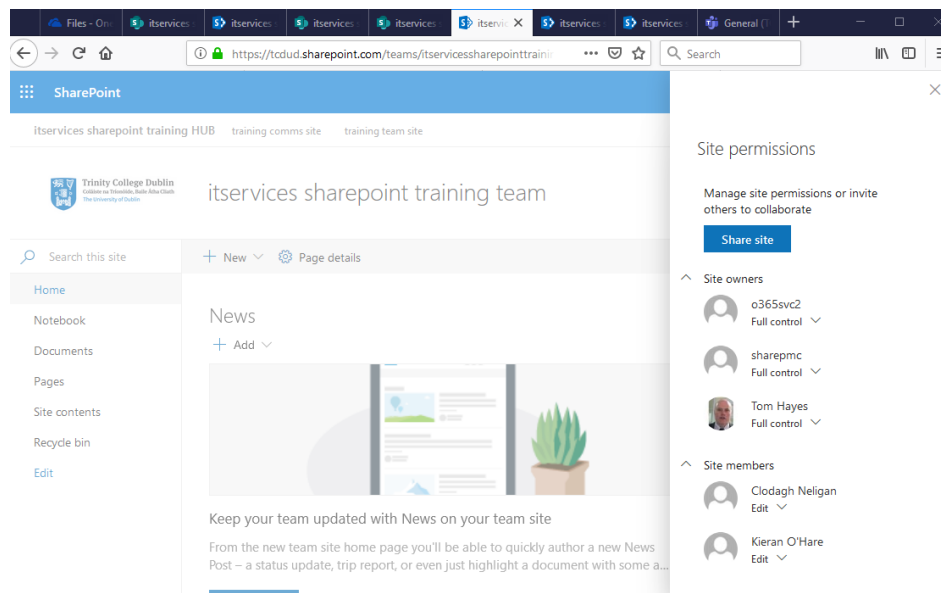
If you can change the content and the settings on the site you belong to the **Owners** group which has the **Full Control** permission level. One of the common tasks that a site owner performs is managing permissions.

2.11. Managing Permissions

As a member of the Owners group you determine the level of access to your site. You can grant users access to the whole site, or to specific information on the site, such as a list or even a single file. Assigning permission levels to a specific item can help you to protect sensitive content, such as a contract or budget information, without restricting access to the rest of the site.


SharePoint groups and permission levels help you to efficiently manage access to sites. You add users to SharePoint groups and assign permission levels to your site and to its contents. By default, permissions on lists, libraries, folders within lists and libraries, items, and documents are inherited from their parent site. However, you can assign unique permissions to items at a lower level, such as subsites, libraries, or even files.

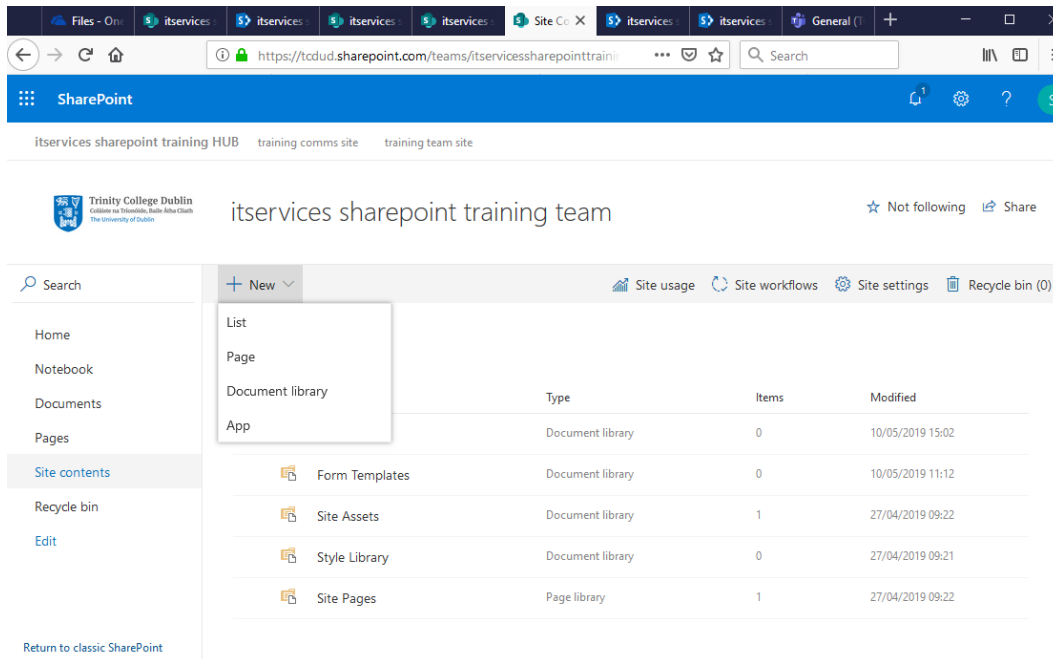
1. Select Site Permissions from the **Settings** menu







2. Add, remove and edit permission levels

2.12. Lists

1. Click **Settings**  and then click **Site contents**.
2. Click **+ New**, and then click **List**.



	Type	Items	Modified
	Document library	0	10/05/2019 15:02
 Form Templates	Document library	0	10/05/2019 11:12
 Site Assets	Document library	1	27/04/2019 09:22
 Style Library	Document library	0	27/04/2019 09:21
 Site Pages	Page library	1	27/04/2019 09:22


3. Type a **Name** for the list, and optionally, type a **Description**.

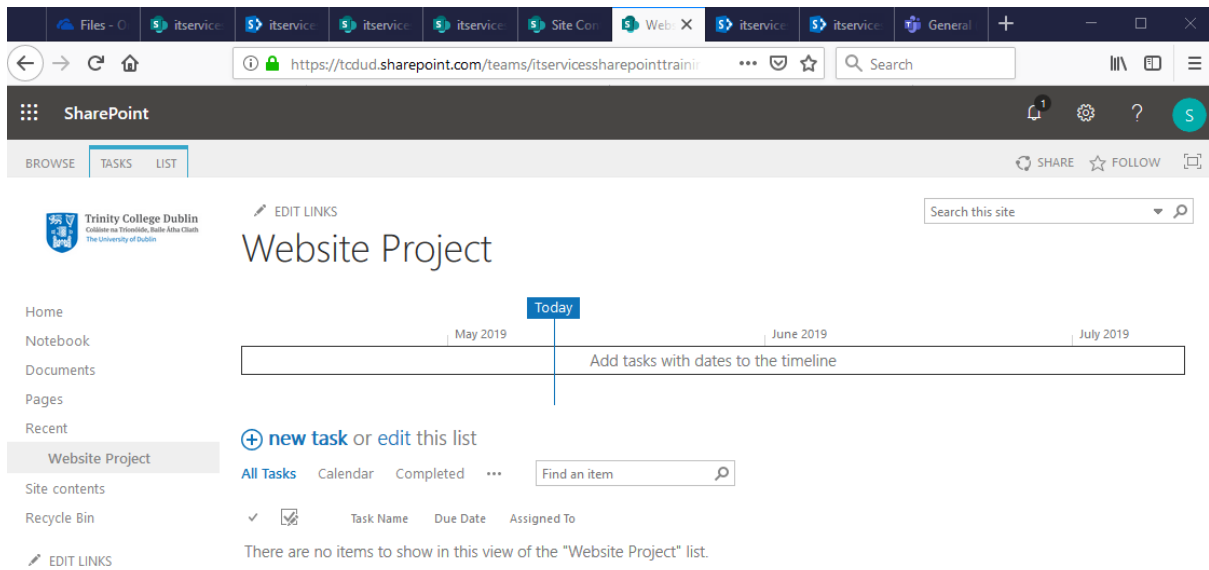
The name appears at the top of the list and can show in site navigation to help others find it.

4. Click **Create**.
5. When your list opens, you can click **+** or **+ Add column** to add room for more types of information to the list.

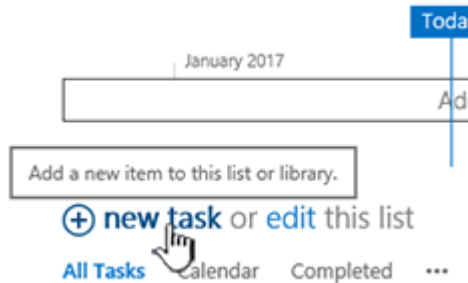
For more info on adding columns, see [Create a column in a SharePoint list or library](#) .

2.13. Create a task list in SharePoint Online


1. From your site's home page, click **Settings**  and then click **Add an app**.
2. Type a name or title for the task and press **Create**.



5. SharePoint Online returns you to the **Site contents** page. Find the app you just created in the **Site contents** list and open it. SharePoint Online creates a default timeline and a blank list.
3. You can start entering data using **+new task** to add data.



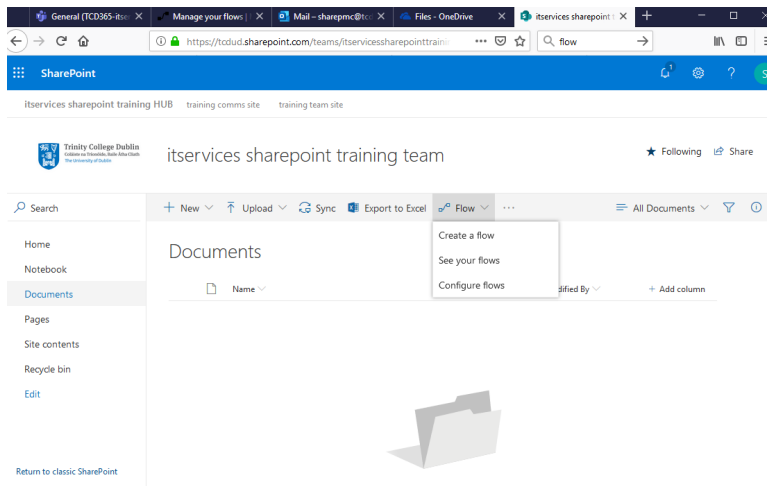
2.14. Add a Calendar in SharePoint

1. From your site's home page, click **Settings**  and then click **Add an app**.
2. Select Calendar. Give it a name.
3. Access its full features in Site Contents.

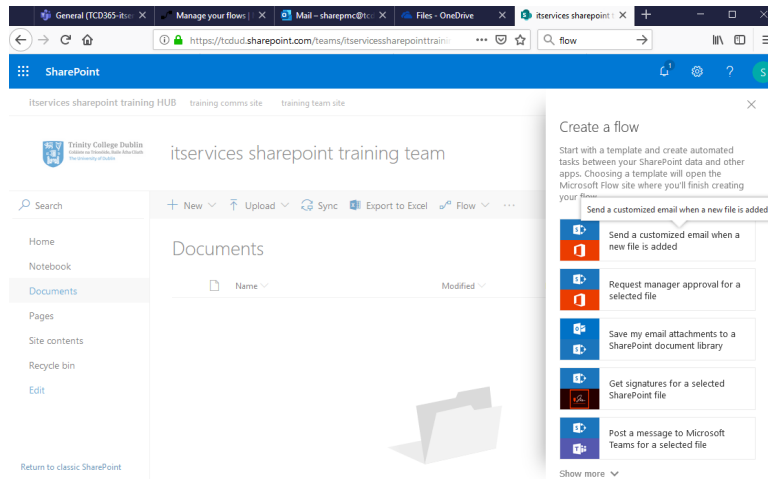
2.15. Create a flow for a list or library in SharePoint Online or OneDrive for Business

1. Create a Flow

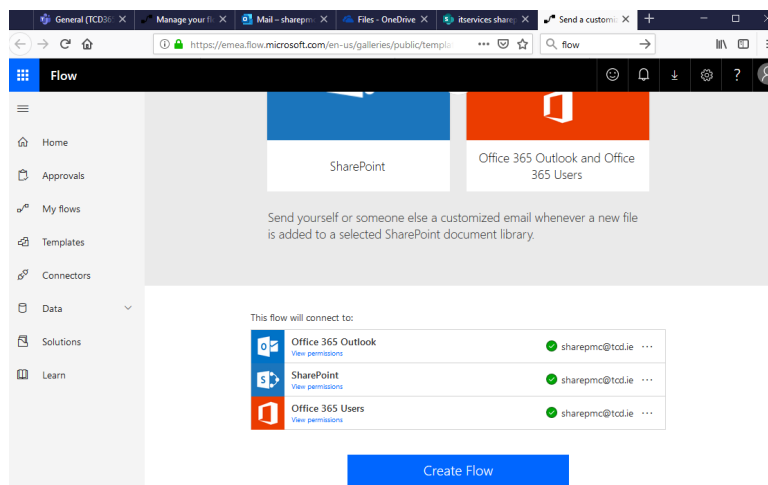
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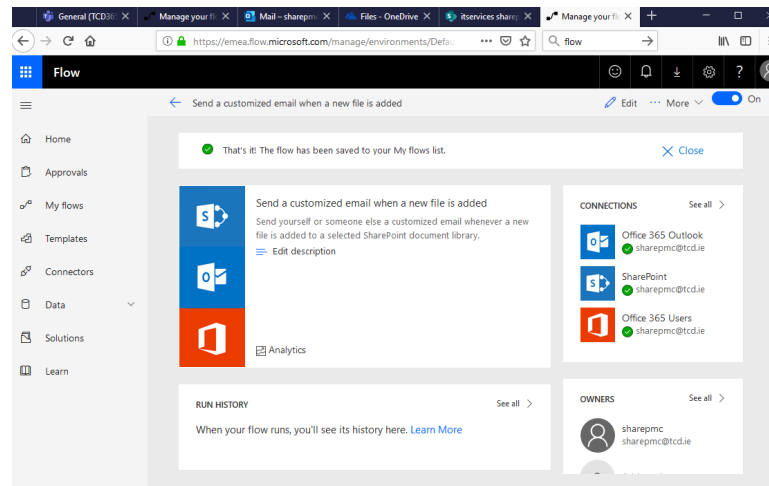


2. Send a customized email when a new file is added



3. Create Flow



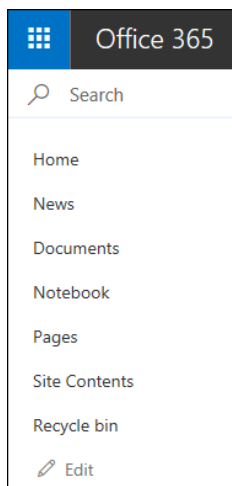


For more information, see <https://support.office.com/en-ie/article/create-a-flow-for-a-list-or-library-in-sharepoint-online-or-onedrive-for-business-a9c3e03b-0654-46af-a254-20252e580d01>
<https://www.lynda.com/Flow-tutorials/What-Flow/653222/684559-4.html>

2.16. Associated Sites – Linking

Add a link to the left-hand menu on a team site

1. Click **Edit** at the bottom of the left-hand menu.



Note: If you don't see **Edit**, you might not have permissions to customize the site navigation. You must have at least Manage Lists permissions. Contact the site owner either to get permissions to make the changes yourself or to have the changes made for you.

2. Hover over the location in the menu where you want to add a link and click **+**.

3. On the **Add a link** dialog box, choose one of the following link options:

- **URL** to add a link to any item, internal or external to your company. Just enter the address and a display name for the link.

Add a link

Choose an option

URL

Address

http://

Display name

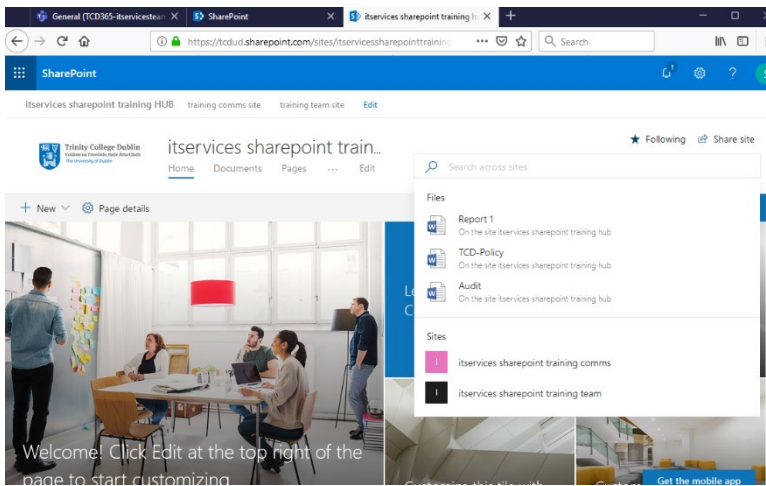
URL

For more detailed information, see <https://support.office.com/en-ie/article/customize-the-navigation-on-your-sharepoint-site-3cd61ae7-a9ed-4e1e-bf6d-4655f0bf25ca>

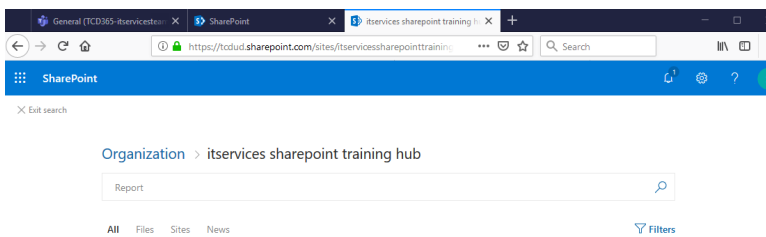
2.17. Searching in SharePoint

1. In a SharePoint Hub Site, you can search associated sites and content:

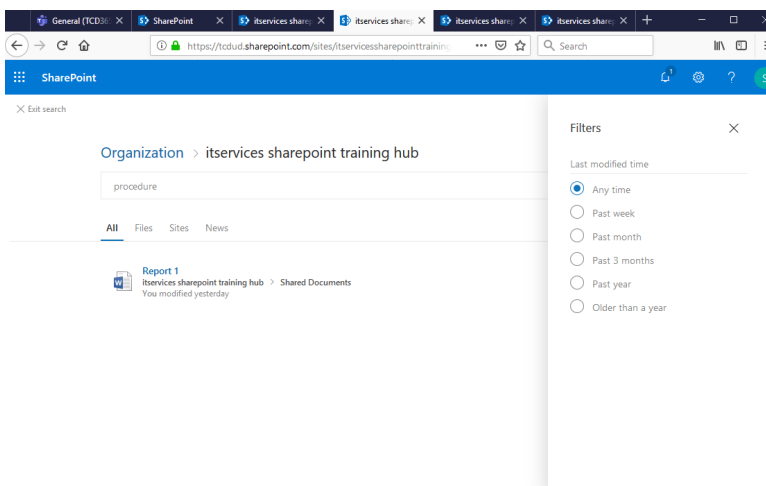
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2. The results which come back are sorted a All, Files, Sites, and News:



3. Filter by date.



3. Teams

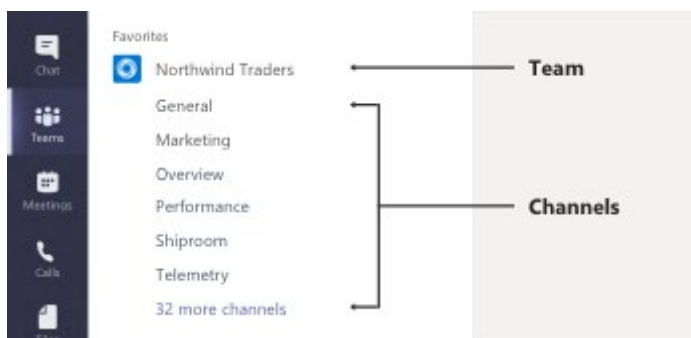
For more detailed overview about Teams, see <https://www.microsoft.com/en-us/microsoft-365/blog/2016/11/02/introducing-microsoft-teams-the-chat-based-workspace-in-office-365/>

3.1. Requesting a Team

3.2. Channels Overview

A **team** is a group of people gathered to get something big done in your organization. Sometimes it's your *whole* organization.

Teams are made up of **channels**, which are the conversations you have with your teammates. Each channel is dedicated to a specific topic, department, or project.



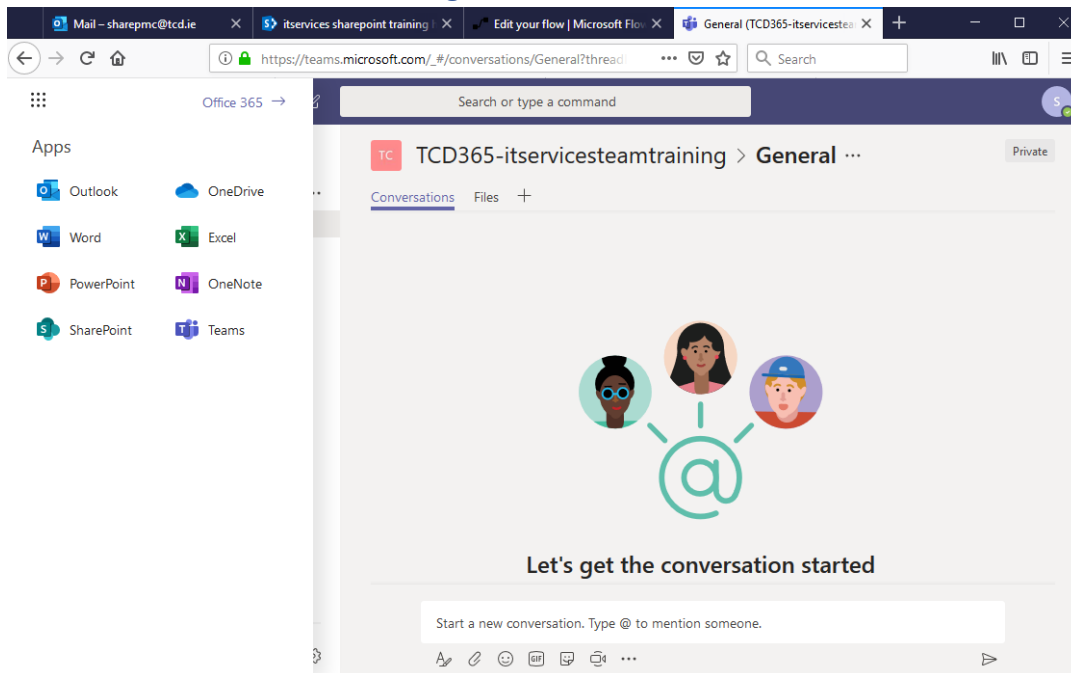
For example, the Northwind Traders *team* has General, Marketing, Overview, and 35 more *channels*. All the conversations, meetings, files, and apps in the Marketing channel have to do with marketing, and everything in this channel is visible to everyone on the Northwind Traders team.

Channels are where the work actually gets done—where [text, audio, and video conversations](#) open to the whole team happen, where [files are shared](#), and where [apps are added](#).

While channel conversations are public, **chats** are just between you and someone else (or a group of people). Think of them like instant messages in Skype for Business or other messaging apps.

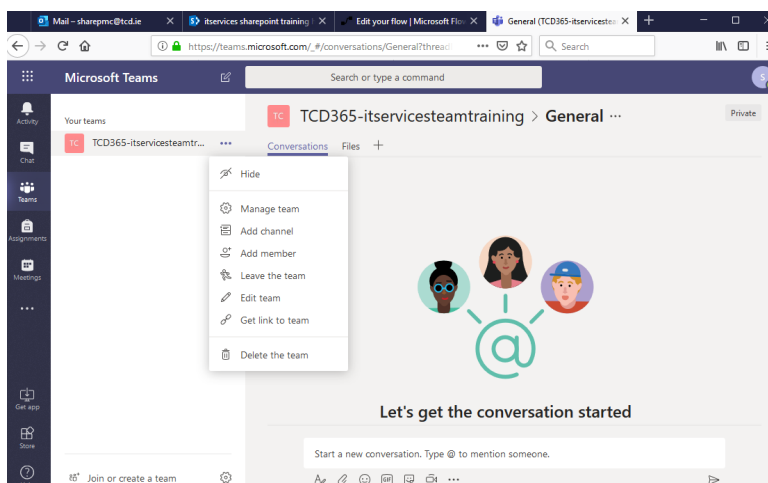
3.3. Access to the Team using M365 online and client apps

3.4. Access to the Team using M365

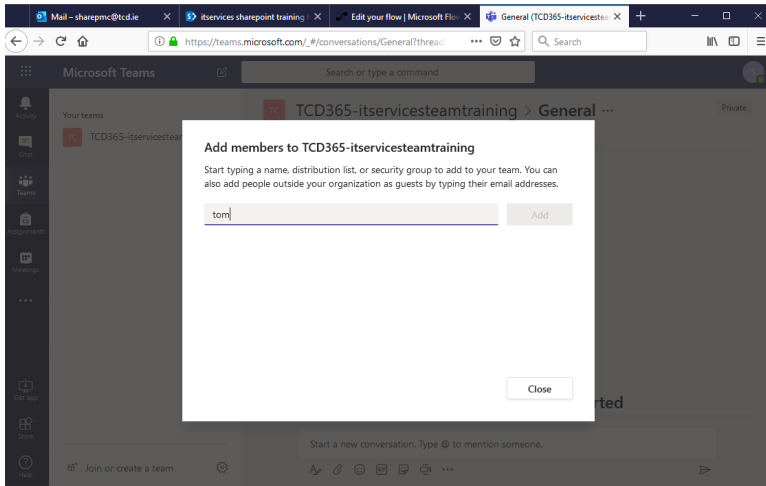


3.5. Setting up the Team, including external users

1. By default, your team is Private, meaning you'll have to add the people or groups you want on the team.
2. Select Public if you want anyone in the organization to be able to find and join the team.
3. Add members.
4. You can add people, groups, or even entire contact groups.
5. If you need to add people from outside your organization, use their email address to invite them as guests. Add a friendly display name for them too.

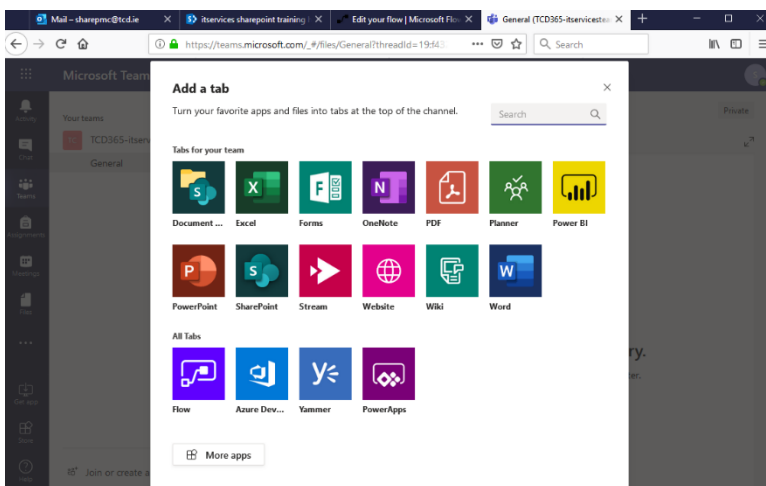


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3.6. Organising the Team list, best practice guide for setting up a Team channel and tabs

1. To add a tab in Team, click +



2. Select the app.

3.7. Planner overview

1. To add Planner to the tab in Team, click +
2. Create a new plan or use existing plan
3. Press save

3.8. Document/files management and sharing (internal and external)

This is a similar process to SharePoint and OnceDrive.

3.9. Teams and Channels overview

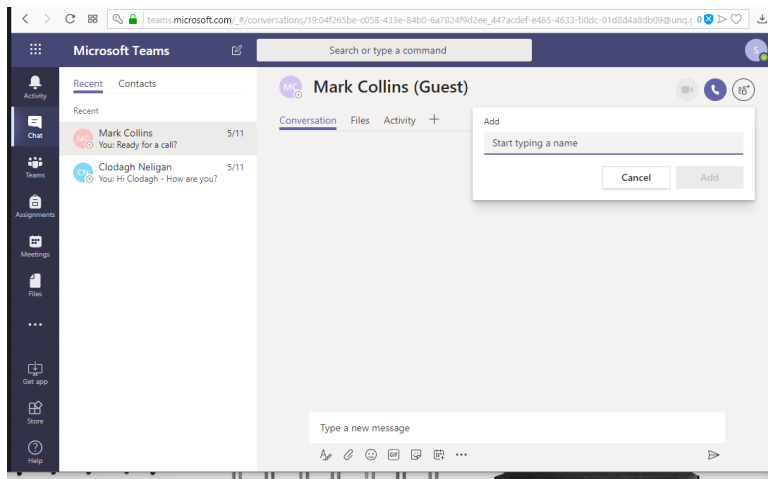
Create a channel

By default, every team gets a **General** channel, which is a good channel to use for announcements and information the whole team needs. To add more:

1. Select **More options** next to the team name.
2. Select **Add channel**.
3. Enter a name and description for your channel.
4. You can build a channel around a topic, project, department name, or whatever you like.
5. Select **Automatically favourite this channel for the whole team** if you want this channel to be automatically visible in everyone's channel list.
4. Select **Add**.

3.10. Posts and messages overview

To loop more people into a private conversation, just click **Add people** **Add people to team** button in the top right corner of your screen.



3.11. Chats, calling and meetings overview

3.12. Activity feed

The activity feed in Microsoft Teams is the user's single inbox for all activity across Teams. The feed aggregates important content from the following:

- Teams/channels
- Chats
- Apps such as Files, Planner, and your Teams apps

If your app posts cards and other messages into a channel, they'll automatically show up in the user's feed if he or she has followed that channel.

Additionally, you can also send personal chat messages into the feed as preview cards summarizing your app's activity. You can construct the message such that choosing the card navigates the user

straight to the message or object that triggered the notification, such as an entity in a tab. This allows the user to see the full content of the activity.

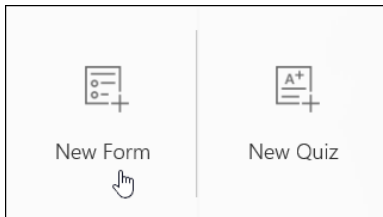
3.13. [Governance, management and expected lifecycle](#)

4. Forms

4.1. Create a training feedback form

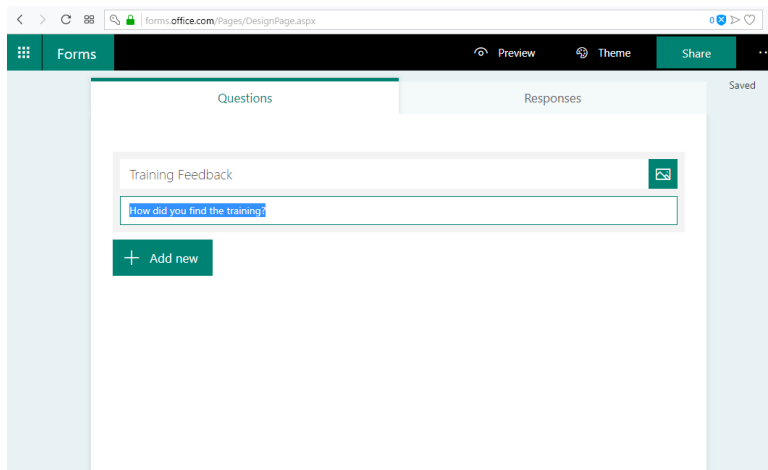
Please Note: The Form saves automatically.

1. In your web browser, go to forms.microsoft.com.
2. Sign in with your Microsoft 365.
3. Under **My Forms**, click **New Form** to begin creating your form.



4. Enter a name for your form. You can also enter an optional subtitle.

Note: Form names can contain up to 90 characters and a subtitle can contain up to 1,000 characters.

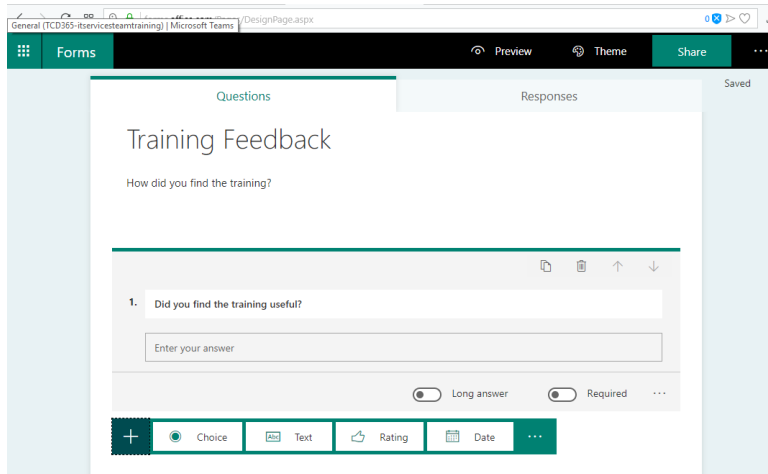


5. Click **Add Question** to add a new question to the form. Choose from **Choice**, **Text**, **Rating**, or **Date** questions.

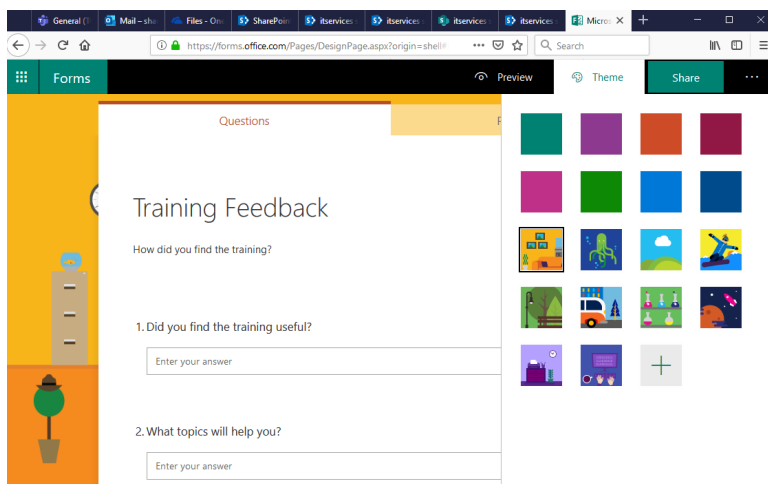


Note: Your form is saved automatically while you create it.

6. For choice questions, enter the text you want to display for the question and each of the choices.

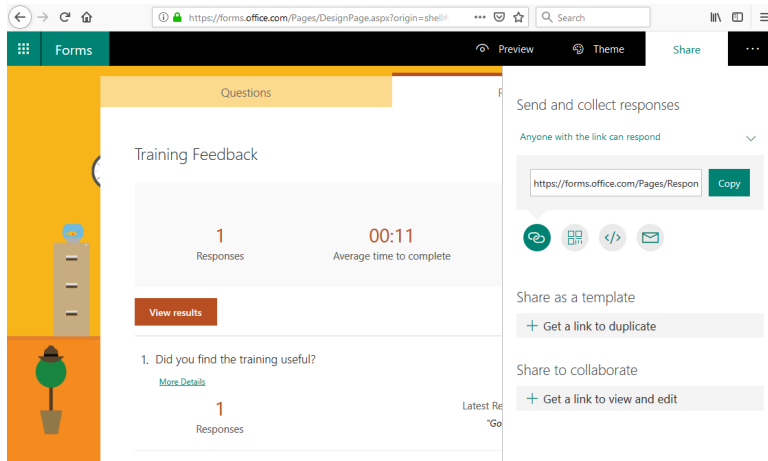


7. Add the following 'Text' questions:
 1. Did you find the training useful?
 2. What topics will help you the most?
 3. What topics were new to you?
8. Add the following 'Choice' questions:
 1. What Apps will you use the most? (Allow multiple answers)
 1. SharePoint
 2. OneDrive
 3. Teams
 2. Would you like to attend a more advanced course?
 1. Yes
 2. No
9. What topics would you like included in the course?
10. How would you rate your trainer?
11. Add a Theme



12. Share the form

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13. Create a Summary Link to share the results

