Getting Started with SharePoint Online for Enterprises

By

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What is SharePoint Online?

SharePoint Online is a component of Microsoft Office 365 and is a hosted version of SharePoint Server 2010 in Microsoft datacenters. It is accessed across the Internet typically using a web browser but can also be accessed directly from many Microsoft Office applications like Word.

SharePoint is a Microsoft product that is available either on site or from the ‘cloud’. It is simply an internal web site also known as an intranet. Into this web site you can store all sorts of information including documents, spreadsheets, emails, etc. You can also store other general information that is typically part of any business including things such as tasks, calendars, projects and more. In many ways it can become the central repository for all the information you have in your business. Importantly, information saved in SharePoint can easily be searched.

SharePoint provides the flexibility on which you can create just about anything you require to manage your informational needs and work together in teams.

What does this document contain?

This document will examine the basic operation of SharePoint Online for Enterprises via the Office 365 E Plans. SharePoint Online is also available for Small Business and Professionals via Office 365 P Plan, but this document will not specifically cover that version.

This document will examine the following basic components of SharePoint Online:

1. Shared Documents
2. Calendar
3. Tasks
4. Picture Libraries
5. Recycle Bin
6. Search

This document will take you step by step through these areas showing you each item in detail, including screen shots. If you have access to SharePoint Online for Enterprises already you are encouraged to follow along with the tutorial to get a better feel for the power of SharePoint.

This tutorial process will make changes to the default SharePoint Online Team Site. These changes can be undone however the complete process of restoring the site back to its original state is not completely covered in this guide.

You will also find a number of common SharePoint terms underlined throughout the document. You will find a summary of these terms in the Glossary at the end of the document.
Also at the end of the document you will find a list of resources to help improve and extend your understanding of SharePoint.

**How can I use SharePoint Online?**

SharePoint Online is accessed normally by simply opening a browser on any machine connected to the Internet and entering the Office 365 portal URL by typing https://login.microsoftonline.com into the address line. After doing so you should now see the following screen displayed:

![Office 365 Sign In Screen](image)

You can use just about any browser to access SharePoint Online however you get the most functionality when you use Microsoft’s Internet Explorer. If you choose another browser then some of the options and displays may be different from what is covered here.

Once you enter your Office 365 User ID and Password and press the Sign in button you will be taken to the Office 365 portal which should look something like:
You can now access your SharePoint Online Team site from here in two ways:

1. You can click the **Team Site** link at the top of the page.

Or

2. You can click the **Visit SharePoint Home** link under the **Team site** section at the bottom of the page.

Either of these will take you directly to your private SharePoint Team Site.

You should now see something like:
Because **SharePoint** is just like a web site you can navigate around it just like other web pages. You will notice that **SharePoint** pages contain a number of hyperlinks which can be clicked, allowing navigation to more information. For example, click on the word “**Shared Documents**” in the middle of the page to be taken to the **Shared Documents** area of the Team Site.

If you are unable to gain access to the Team Site or you receive an access denied message then you need to speak with your **Office 365** administrator to grant you access to the default Team Site. By default, users with Office 365 Enterprise (E SKUs) licenses are not automatically given access to **SharePoint Online** sites so if you can’t access the site you will need to speak to your administrator.

Once you have clicked on the hyperlink **Shared Documents** you should see a screen like this:
To return to the front page again simply press the Back button in your browser.

You can also return to the front or Home Page of your SharePoint site by clicking the Home tab in the top left of the screen.

When you return to the Home Page you will notice that SharePoint is laid out in a specific manner.
Down the left hand side is what is known as the *Quick Start* menu. This menu is generally shown on every page in SharePoint and allows you to easily navigate to any location in SharePoint directly by clicking on that item.

We will now navigate briefly through this *Quick Start* Menu to give you an overview of the components that the Team Site contains by default.

1. **Shared Documents**

Click on the link *Shared Documents* that appears on the *Quick Start* menu on the left hand side of SharePoint.

You should now see a screen like:
The **Shared Documents** area is called a **Document Library** in SharePoint. In here you can store any sort of file you wish including things like word processing and spreadsheet files.

The first step in using a **Document Library** is to upload some documents. To do this, click on the **Add Document** link in the middle of the window in the **Document Library**.

You should now see a screen like:
If you now click the **Browse** button you can navigate to any file on your local system like so:

After selecting the file to be uploaded and pressing the **Open** button, the location of that file will be transferred to the **Name** field in **SharePoint** as shown below.
To upload the selected document to the Documents area of your Team Site, simply click the OK button.

You should now see the document you selected appear in the list for the Document Library. In this case a Word document has been uploaded and the Word icon appears at the beginning of the line to indicate the document type.

If you now click on the document name it will attempt to open. You will generally only be able to view the document if you have the corresponding application for that document on your local machine. However, in the case of Microsoft Office documents like Word, Excel, PowerPoint and OneNote the file will automatically open in a browser for viewing like so:
You’ll see that there is also an option on the menu bar to Open in Word and Edit in Browser giving you the opportunity to edit the document either in the native desktop application or directly in the web browser.

To close the document and return to the Team Site select File in top left and then Close

The ability to both view and edit Microsoft Office documents directly in a browser via SharePoint Online is known as Office Web Apps.
You can repeat this process of selecting **Add document** in **Documents**, then pressing the **Browse** button and locating the desired file and finally selecting **OK** to upload documents. Please take the time to upload a few different documents into the **Documents** area using this process.

The next question you are probably going to ask is whether you can upload multiple documents at once. The answer is yes you can, however for this tutorial we will not cover that option. For further information on this topic look at the **Where to go from here?** section at the end.

Once you have uploaded a few documents into **Shared Documents** your **Document Library** should look something similar to what’s shown above.

You will notice that some files display an icon in the **Type** field (typically Microsoft Office documents) while others don’t (in this case Acrobat PDF).

You may be wondering why using a **SharePoint Document Library** is any different from storing the file in folders on your local computer. Here are some examples of the added functionality that **SharePoint** can provide.
If you click once on the word **Name** in the column heading directly above the first file you uploaded you should see a small arrow appear to the right.

This indicates that the **Document Library** file list is sorted alphabetically from A to Z. If you click the **Name** field again you should see that the arrow now point down and the documents in the **Document Library** are arranged from Z through A automatically.

You can repeat this sorting process by clicking on any column heading.
If you hover your mouse over the Type field heading a small triangle should appear to the right. If you now click that arrow, a drop down menu will appear as shown above.

Not only can you sort information in the Document Library but you can also filter what you see. Select one of the document types (in this case we will select doc) from the menu that appears.

You should now find that only documents that match the type you just selected appear in the list (in this case only documents that are of type doc). You will also notice that a small filter symbol appears in the Type column heading. This indicates that a filter has been applied to this column telling you some of the information in the Document Library is being hidden. This now makes it extremely easy to locate documents of any type in your Team Site Document Library.

This filtering can be applied to single as well as multiple columns. Imagine how much easier it would be to locate documents this way rather than simply using file folders stored on your local computer.
If you again hover over the **Type** heading and press the down arrow that appears, the menu will again appear. To clear the filter, simply select the option **Clear Filter from Type**. Once selected, your view will return to normal and all the documents in the **Document Library** again will be displayed.
If you now hover your mouse over the name of any file in the Document Library you should see another down arrow appear to the right of the entry. **Press** on the arrow once to display the menu as shown above.

You will notice that an option called *Check Out* is displayed. This is because SharePoint can function as a basic document management system. By checking a document out the author is able to make changes but others are not. All they are able to do is view a read-only copy until the file is checked back in. Go ahead and select the **Check Out** option from the menu.

Once the document is checked out you will now see it has a small green icon with an arrow in it on top of the normal *Type* icon. This indicates to other Team Site users that that document is currently checked out and unable to be edited. As the person who checked the document out you are now free to make changes to the document. These changes will not be seen by other users until you check the document back in. Other users are able to view the original document but not make changes until you check the document in again.
To check the document back into the Document Library simply hover over the file name entry again and click on the down arrow on the right of the file name when it appears. In this menu you will now see the option to Check In, select this.

Since you are checking the document back into the Document Library you are prompted to enter information about the changes that you made. You can also elect to leave the document checked out if you wish to work on it further. By providing optional comments you are creating
an audit tracking trail for that document that makes it easier for others to understand the changes you have made. Press the OK button when complete.

SharePoint also provides you with the ability to retain a version of each document you check into a Document Library. This means that you can easily roll back to a previous version if required. For further information on that topic look at the Where to go from here? section at the end.

In summary, you should now be able to begin to understand some of the features of Document Libraries that make them superior to normal folders on your local computer. There are many additional features of a SharePoint Document Library however for further information on that topic look at the Where to go from here? section at the end.

2. Calendar

To move to the Calendar location in the Team Site simply click on the word Calendar in the Quick Start Menu on the left of the window as show above.

Once selected, you should now see a screen like the following:
If you now click the *Calendar* tab at the top of the screen you will reveal the *Ribbon menu*.

At the left of the *Ribbon menu* you will find options to display the calendar by *Day*, *Week* and *Month*. Clicking any one of these will change the range that the calendar displays. Clicking on *Day* will display something like:
While clicking *Week* will display:

![Week View](image1)

Click on *Month* to return the page to the original view.

![Month View](image2)
To create a new item in the calendar press the **Events** tab at the top of the screen.

This will change the **Ribbon menu** and display the **New Event** button. Press the **New Event** button from the **Ribbon menu**.
You are taken to a screen where you can now enter the details about the new calendar item, including whether it is an all-day item or recurs.

When complete press the **OK** button to save the details.
When you are returned to the full calendar view you should find your item displayed. Note, that item is now hyperlinked which means you can simply click on that item in future to bring up the details.

Click on the **Browse** tab at the top of the screen to remove the **Ribbon Menu**.

If you now select the **down arrow** that appears at the end of the breadcrumb menu at the top of the window, to the right of **Calendar**, you will see a list similar to that shown above. Most elements in **SharePoint** allow you to have different ‘**Views**’ of your data. This means that the underlying information remains the same just the way it is displayed changes.

For example, select the item **All Events** from the menu that appears, which should now display the calendar in this format:

The **All Events View** displays the data in a similar format to **Document Libraries**. It is possible to create any number of different **Views** of your data for most elements in the Team Site. This makes it much easier for users to find exactly the information they are after.
You are also able to create as many different calendars as you desire within SharePoint. It is possible to link Team Site calendars to Outlook so that information can easily be displayed in both locations. There are many additional features of a Team Site calendars however for further information on that topic look at the Where to go from here? section at the end.

3. Tasks

To move to the Tasks area click on the Tasks item on the Quick Start Menu on the left hand side of the menu.

You should then see a list displayed as shown above.

Tasks is an area in which you can easily add information about ‘To do’ items that are visible to all users.
To create a new Task item simply click on the Add new item link under the headings.

A new task item will now be displayed where you can enter information in about the task.

When you have completed entering information about the task click the Save button.
You will now see the task appear in the list. The listing appears similar to that in Document Libraries.

Click on the Browse tab at the top of the page to hide the Ribbon menu.

As with most elements in SharePoint it is possible to use Views to display the information in a different manner. You can see all the Views available in the Tasks area by clicking the down arrow at the end of the breadcrumb navigation at the top of the screen. If you can’t see the breadcrumb navigation, click the Browse button to the right of Items to remove the Ribbon menu.

If you now click on the item name to display the entry you should see something similar to:
From here you can *Edit* the task, change or add information. You can *Delete* the item so it no longer appears in the list and you can manage the *Permissions* on this item. This allows you to determine exactly which rights users have on this particular item including the ability to view, change and delete. Finally, you have an option to configure email *Alerts* about when changes occur with this item.

Most items in *SharePoint* have the ability to send email *Alerts* when information changes. These *Alerts* can be customized in their frequency and triggers. *Alerts* are configured on a per user basis to provide flexibility around what users receive *Alerts* about.

**Press the Close button to exit the task.**
If you hover over the item in the list and select the down arrow that appears to the right of the field you will see than many of items in the menu that is displayed are similar to those displayed when you actually click into the item.

As expected, it is possible to link these task items with those in Outlook. There are many other additional features of SharePoint tasks, however for further information on that topic look at the Where to go from here? section at the end.

4. Picture Libraries

A default Picture Library does not exist with this version of the Team Site generally, but it is easy to create one. To do that you will need to have the rights to create items in the Team Site. If you don’t have these rights you will need to either have your Team Site administrator add these rights or create the Picture Library for you.

To create a Picture Library select Site Actions (1) in the top left of the Team Site and then More Options (2) from the menu that appears like so:

Scroll through the options listed, click on the Picture Library icon (1),
then give the Picture Library a name on the right (2) and press the Create button.

You should then see a library displayed as shown above. You will also notice on the Quickstart menu on the left that a heading called Lists is shown and a hyperlinked item Pictures resides below it. You can now use this link to navigate directly to the Pictures page.
To move to the Picture Library select Pictures from the Quick Start Menu on the left.

SharePoint Picture Libraries are very much like Document Libraries, however they have a number of special features that makes them more suitable for cataloguing images.

Since the Picture Library has just been created you will need to upload an image.

To upload an image, click the Upload button from the menu bar.
Much like the process of uploading files into a Document Library you will need to press the Choose File button and then navigate your local computer to locate a file you wish to upload.

Once you selected the desired file you will be prompted to enter information about that file as shown above. When you have completed this, click the Save button.
Click on the name of the image you just uploaded.

As with the Task items, you can now see more detailed information about the image. You will notice that it has two fields called Description and Keywords. Into these fields you can enter text information about the image that will make it easier to locate when someone uses search.

To edit the information about this image, click the Edit Item option from the Ribbon menu.
You are now able to enter additional information into the selected fields. In this case you may give the image a suitable title and some descriptive keywords. When complete, simply click the **Save** button.

Much like **Document Libraries** you can upload additional images to the **Picture Library** simply by using the **Upload** button from the **Ribbon Menu**. You can also change the way the data is displayed by selecting from the available library **Views** as shown previously.

5. **Recycle bin**

   If a user mistakenly deletes information it can be easily recovered from within the **Team Site**.

   ![Image Item Visible]

   With the image item visible, click once with the left mouse button in the checkbox that is to the left of the image name. When you do a tick should appear there. From the menu across the top of the library press the down arrow to the right of **Actions**. From the menu that appears click **Delete**.

   ![Delete Prompt]

   You’ll be prompted as to whether you are sure you want to delete the item.

   Select **OK** to continue.
You should now see that the Picture Library is empty. Click on the Recycle Bin item in the bottom of the Quick Start Menu on the left.

In the Recycle Bin you should now see the image that was just deleted. To restore the item to its original location simply place a check next to the item and select Restore Selection from the menu.

You will be prompted as to whether you wish to restore the item. Select OK to continue.
If you now return to the **Picture Library** by selecting the **Team Site** tab in the top left and then **Picture** from the **Quick Start Menu** you will see that the item has been restored to its original location.

**SharePoint** actually has two recycle bins. The first is the one shown above, available for every user. The second is one that is accessible only by administrators. If an item is deleted from the users Recycle Bin it can still be recovered from the administrators Recycle Bin. **SharePoint** therefore has dual layers of protection against any item being mistakenly deleted.

6. **Search**

Click on the **Home** tab in the upper left of the screen to return to the front page.
On the front page you will see a *Search* line in the top right of the screen.

![Search Line Image]

Simply enter term that you wish to search for and click on the magnifying glass to the right of the line to commence the search.

Not only is most of the information you enter into the Team Site searchable but much of the information inside documents stored in the Team Site is also searchable. This means that you can search information stored inside Word and Excel documents that are stored in the Team Site.

7. Cleaning up

This tutorial has shown you how to create a number of new items in your Team Site. In the case where you may not wish to retain these items they can generally be quickly and easily deleted. In some cases you may need to be a SharePoint Administrator to delete these components. To do so, simply navigate to the location where the item appears, typically by clicking on the link in the *Quickstart* menu on the left hand side.
In the case of a Picture Library click on the Settings link in the menu bar.

Then select Picture Library Settings from the menu that appears.
For other items like the Calendar select the List type tab, in this case **Calendar**, to reveal the ribbon.

Press the **List Settings** button on the right hand side of the ribbon.

For all cases now, from the centre column under the **Permissions and Management** heading click **Delete this list**.
You will then be prompted to ensure that you wish to delete this item. Note that all the information inside the list and list itself will be deleted. Most items will be sent to the Recycle Bin to allow recovery if required. However, beware that some items may be deleted permanently.

Press the **OK** button to remove the list.

Once complete you should no longer see this item appear in the *Quickstart* menu. The headings will generally however remain and will need to be removed by an administrator of your Team Site. This process is not covered in this Guide, however for further information see the *Where to go from here?* section at the end.
Conclusion

The Team Site is a very powerful component of Microsoft Office 365. It is build using SharePoint technology that is also available on other Windows Server editions. It is the starting point from which you can create a solution to solve your collaboration needs. Basically, all you need to know is that SharePoint is a standard tool, much like Word or Excel that you can easily customize to suit your business needs.

This document has provided a very basic overview of some of the most common features available with a SharePoint Online for Enterprises (E SKU) Team Site as well as taking you through a basic tutorial of these features. This document should make a great starting point for anyone wanting to come to grips with the basics of SharePoint Online on Office 365.

Where to go from here?

What has been shown here is only the tip of the iceberg as to what can be accomplished with the Team Site and SharePoint Online. The first place to start, if you want more information are the links and video section below. These will provide you with more information about SharePoint which is the technology on which the Team Site is built.

Further documents and information about utilizing the advanced features of SharePoint can be found at http://www.ciaops.com. If you are interested in receiving information about any upcoming documents about SharePoint please send an email to director@ciaops.com asking to be added to our regular newsletter.

If you have any feedback on the information provided here please contact director@ciaops.com.

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Glossary

**Alerts** – Are settings that can be made to most components of SharePoint that will send an email to inform of changes in information. They can be customized in respect to what triggers the sending (change, delete, addition, etc) as well as the frequency (immediate, daily, weekly, etc). They are configured by each individual SharePoint user normally at the location they wish to monitor.

**Document Library** – Are storage locations in SharePoint specifically designed to manage any sort of document (Word, Excel, PDF, etc). Once here, documents can easily be sorted and displayed. It is also possible to configure check in/check out as well as document approval to give better document management than what is normally provided in folders on the local computer.

**Office 365** – Is hosted versions of Microsoft Exchange, SharePoint and Lync. They can be purchased as a suite or individually. All of the servers live in Microsoft data centers but can be accesses anywhere an Internet connection is available.

**Picture Library** – Are similar to Document Libraries but they are specifically designed for the management of images (JPG, BMP, TIFF, etc). They share many features with Document Libraries including the ability to check in/check out document as well as document approval. Importantly, Picture Libraries allow additional descriptive information to make locating images much simpler.

**Ribbon Menu** – Much like the ribbon that is evident in Office 2007 and 2010 products SharePoint 2010 will now display a ribbon menu to provide you with a greater range of options. The ribbon menu is context sensitive only showing you the options that are available depending on where you are located in SharePoint 2010.

**SharePoint** – Is the Microsoft technology on which the Office 365 Team Site is based. It is a web front end onto a database in its simplest form. It is accessed via a standard web browser but provides much greater functionality when viewed with Internet Explorer. SharePoint can be used to manage a variety of information sources from documents to ad hoc lists with everything inside it being fully indexed for search ability.

**SharePoint Online** – Is the hosted version of SharePoint Server 2010 provided by Microsoft via Office 365.

**Views** – Are different ways to display the same data. You are able to have a number of different Views of the same data between which you can easily select. Views can also be used to aggregate data within a list such as summing up values in a column, averaging values, or other aggregation functions.
Links

- Microsoft SharePoint
  http://sharepoint.microsoft.com/en-us/Pages/default.aspx

- Document collaboration and co-authoring

- SharePoint 2010 Help and How to

- Synchronize SharePoint 2010 content with Outlook 2010

- Office 365
  http://www.office365.com

Videos

- Increased user productivity with SharePoint 2010 Search

- What can SharePoint do for you?

- SharePoint in plain English
  http://www.youtube.com/watch?v=s12Jb5Z2xaE

- Other SharePoint tutorials
  http://www.youtube.com/directorciaops
  http://www.youtube.com/saturnalliance
About

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Company – Computer Information Agency (www.ciaops.com)

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