



Getting Started with Microsoft SharePoint Online

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What is SharePoint and How is it Used?

SharePoint is a Microsoft software **platform** that was launched in 2001. It's not a traditional program like Word, Excel or PowerPoint. It is used to build websites. These websites can be used to store and share documents, manage tasks, and collaborate on projects, follow team conversations, share a calendar, and much more. It enables members of a team to access critical business information. A company can also share information with partners and customers.

SharePoint can be used to create a website for the public or an intranet site for your company. To see just how powerful SharePoint can be, visit Ferrari.com. The site was built using SharePoint.

A common use for SharePoint is to store files like Excel spreadsheets, Word documents, PowerPoint presentations, PDFs, drawings, and pictures.

You can also present web content like web pages, blogs, and wikis.

A third use is to manage work processes. You can create custom forms for people to fill out. Then, establish workflows so that information is routed from person to person. People can sign off before the information is sent to the next person or people.

SharePoint was designed to integrate with other Microsoft products. For example, SharePoint integrates with Microsoft Outlook, Excel, Word, OneDrive, Teams, etc.

Information can be accessed from any device that connects to the internet. Permissions can be set to determine who can access content and what they can do with it.

All the information is searchable in SharePoint. You can search by author, keyword, or other metadata. Metadata is a custom property that further describes the document or list item.

SharePoint stores information in *sites* which contain *lists* and *libraries*. The libraries are also called *document libraries*. You may know that another name for a list is a database. Databases consist of *fields* and *records*. If you've ever created a table in Microsoft Word, you've created a database. Document libraries are databases that contain documents.

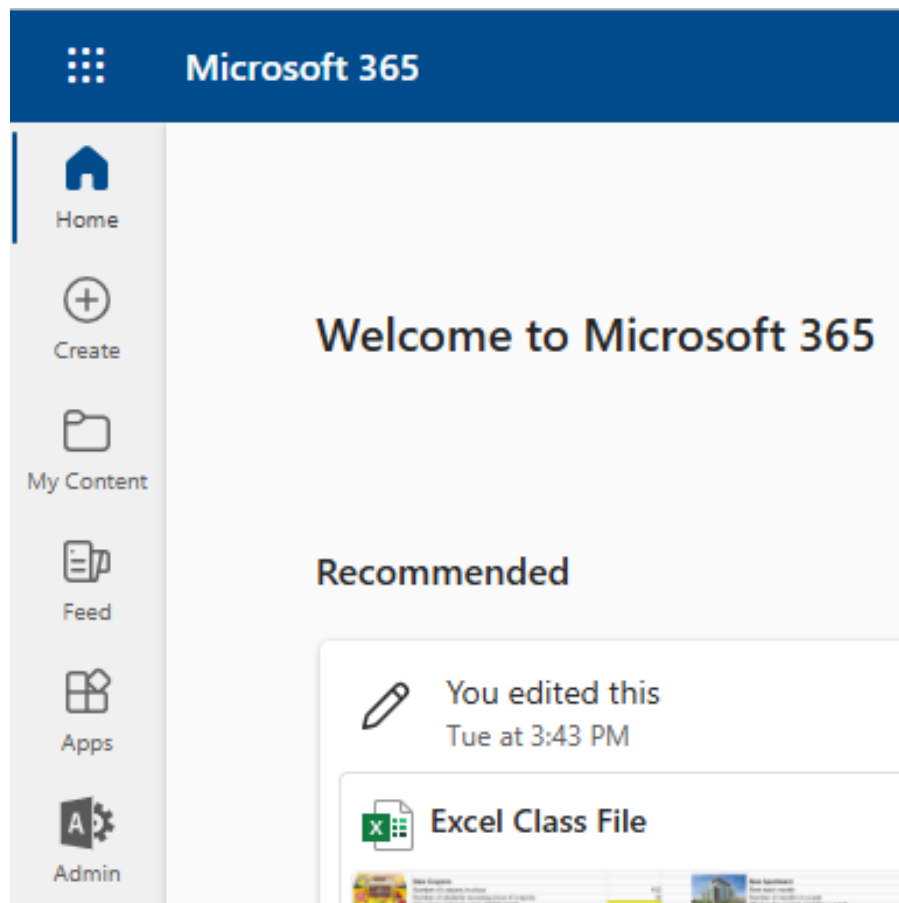
Employee ID	First Name	Last Name	Date of Hire	Manager
18654	Carlos	Riviera	3/4/19	Lucy Thran
87547	Joseph	Manning	3/8/19	Louise Hatcher
33845	Cindy	Thoreau	4/5/19	Adam Iconie

Accessing SharePoint Online

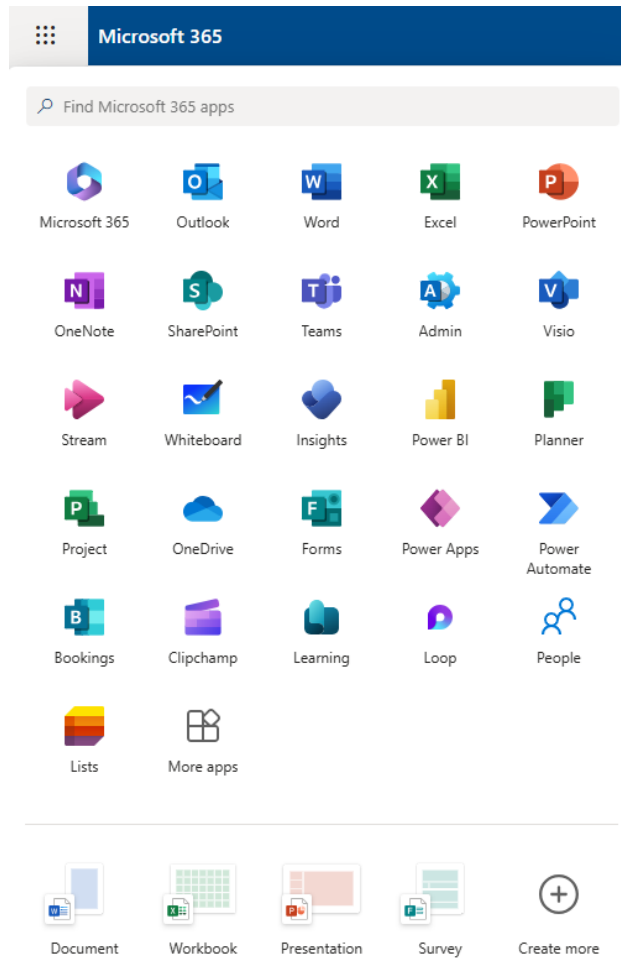
Each company may have its own process for accessing SharePoint Online. Below is a standard method that works for Office 365.

1. Open a browser like Edge.
2. Type **portal.office.com** and press Enter.
3. Enter your username and password.
4. Click Sign in.

In the upper left corner of the screen, you will see a grid of dots called the App Launcher. It is also commonly referred to as “the waffle.”



5. Click the App Launcher to view a list of available programs.

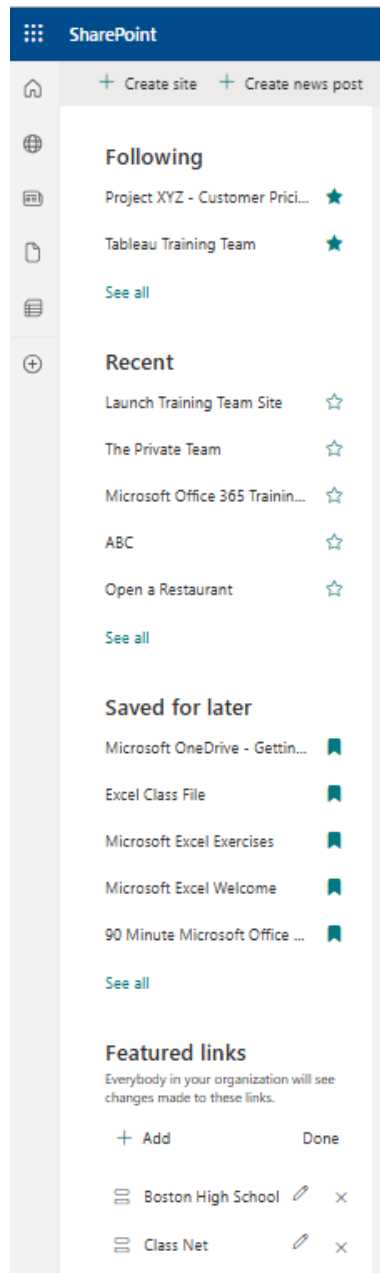


6. Select SharePoint.



Accessing SharePoint Sites

On the left, you will find a list of sites you are following, recent sites you've accessed and featured links. Above these lists is a search box you can use to find sites sites, in your organization, that are not listed below. The most common way to access a site is with a link that has been sent to you via email or chat.



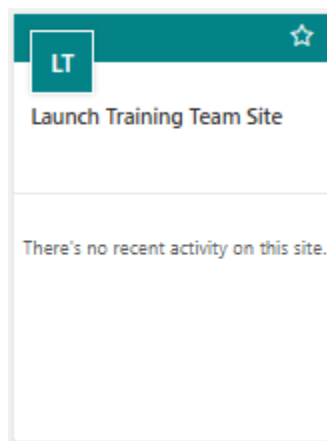
Sharing or Following a Site

There are several benefits to sharing and following sites:

- Find the site easily in a list of followed sites
- View site activity in your newsfeed
- Share your own content with someone else

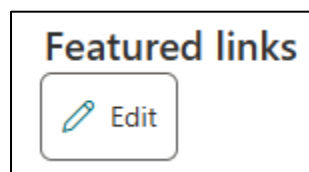
To share or follow a site:

1. Click the FOLLOW icon in the upper right corner of the site. It looks like a star.

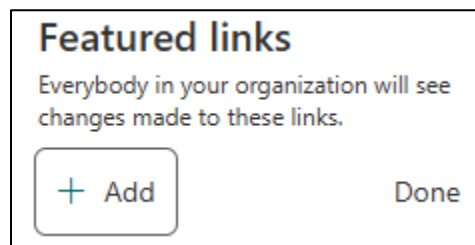


Adding Links to the Featured Sites List

1. Click the Edit button.



2. Click Add.



3. Fill in the text to display and the path to the site.

New link ×

Text to display

Address

Try link

☐ Hide in SharePoint mobile app

Save Cancel

4. Click Save.

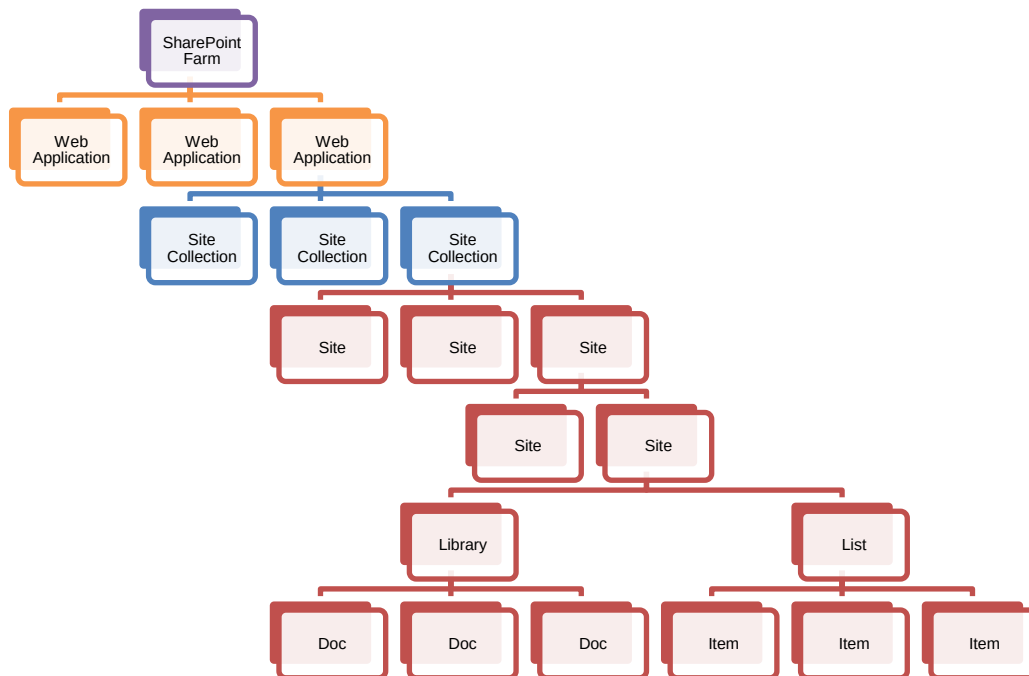
The SharePoint Hierarchy

Information in SharePoint is organized into a structure consisting of the following elements:

- SharePoint Farms
- Web Applications
- Site Collections
- Sites
- Libraries
- Lists

One SharePoint site can contain or be connected to other sites. The main site is called the *Root Site*. The hierarchy of sites is called a *Site Collection*.

Most users will only be exposed to the part of the hierarchy from Site Collection down.



Creating a Team Site

SharePoint allows you to create team sites and communication sites. The difference between team sites and communication sites in SharePoint is as follows:

Purpose: Team sites are designed for collaboration and working together on projects within a team. They provide a centralized location for team members to store and share documents, manage tasks, and collaborate on projects. Communication sites, on the other hand, are used for broadcasting information to a wider audience. They are ideal for sharing news, announcements, and updates with a larger group of people.

Audience: Team sites are typically used by a specific team or department within an organization. They are meant for internal collaboration and communication among team members. Communication sites, on the other hand, are designed for a broader audience, including both internal and external stakeholders. They can be used to share information with employees, partners, customers, or the general public.

Content: Team sites are focused on document management and collaboration. They provide features such as document libraries, lists, and workflows to facilitate team collaboration and project management. Communication sites, on the other hand, are more focused on content publishing. They provide features such as news articles, announcements, and web pages to share information and engage with the audience.

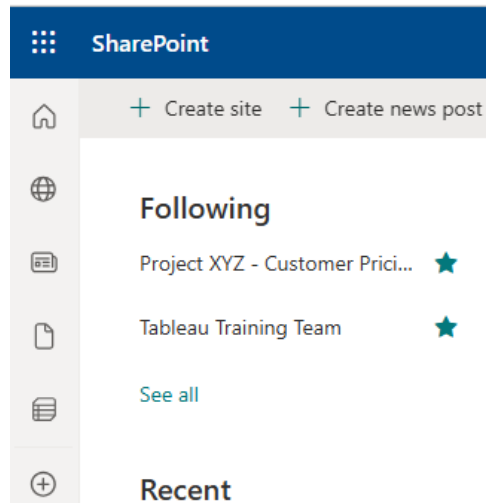
Design: Team sites are typically more structured and organized, with a clear hierarchy and permissions set up for team members. They often have a specific purpose or goal, such as managing a project or department. Communication sites, on the other hand, are more flexible in terms of design and layout. They allow for more customization and branding options to create visually appealing and engaging content.

Permissions: Team sites are usually restricted to team members or specific individuals who have been granted access. The content within team sites is typically confidential or sensitive to the team or organization. Communication sites, on the other hand, are often open to a wider audience and may have more relaxed permissions. They are meant to share information with a broader group of people, both internally and externally. Overall, team sites are focused on collaboration and project management within a specific team or department, while communication sites are designed for sharing information and engaging with a broader audience.

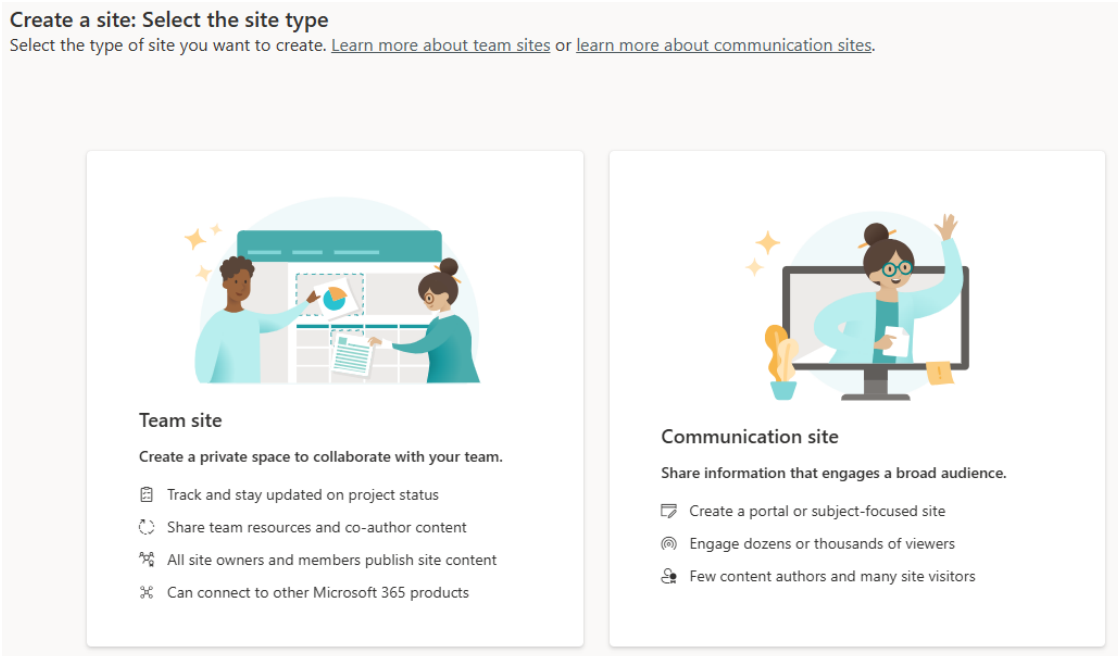
Modern Team Sites and Communication Sites

Some users prefer Microsoft's classic sites. Once your site is designed you can view it in classic or modern unless restrictions have been placed on the site by its administrator. When adding a project subsite, you will have a choice to create either classic or modern.

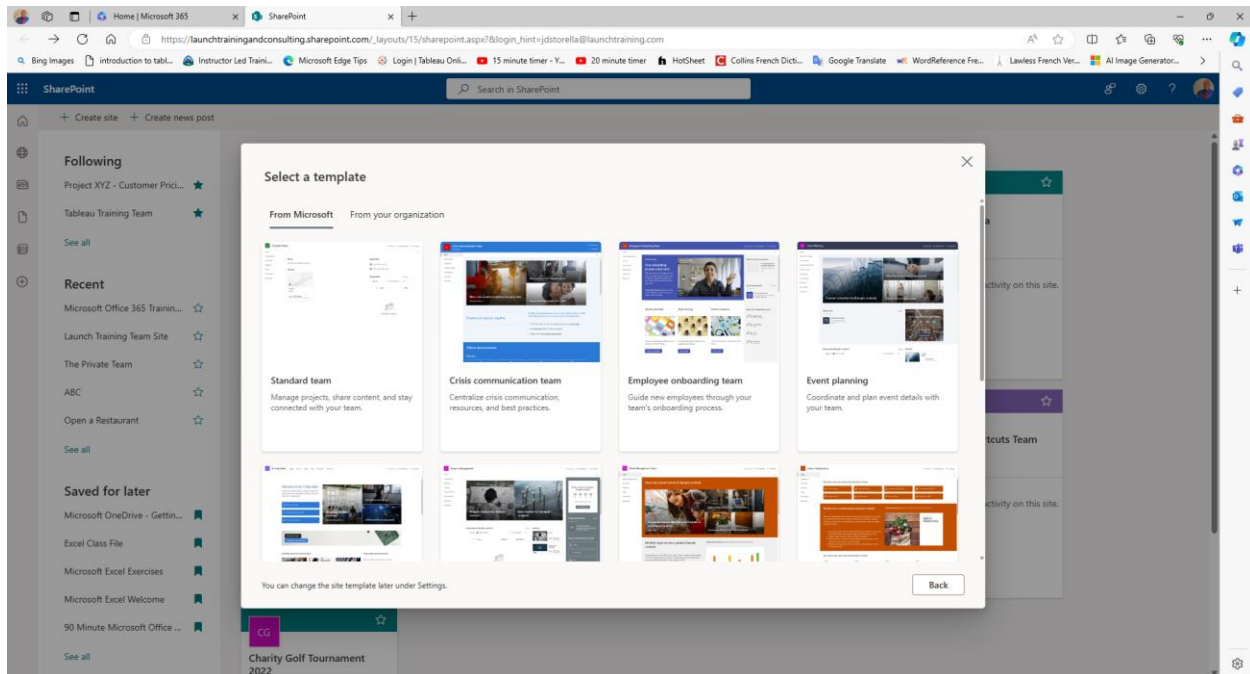
1. Click the Create site link in the upper left corner of the screen.



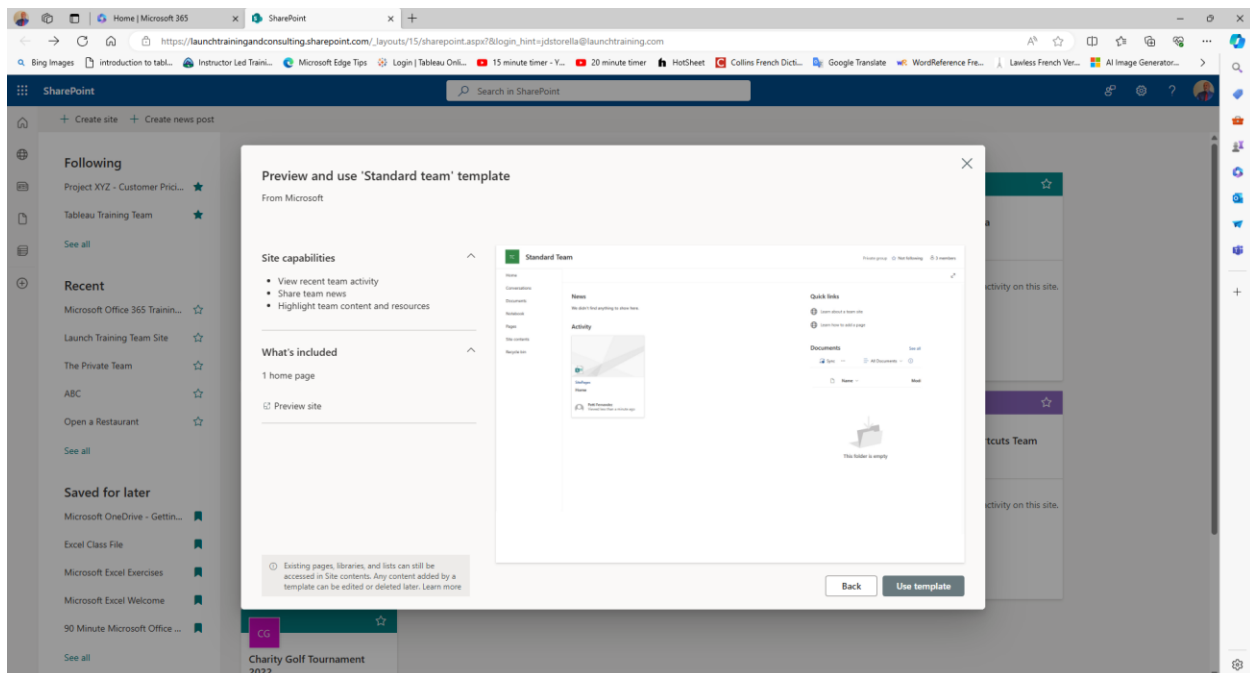
2. Select Team site.



You can select from a number of templates, or you can create a standard team site.



3. Select Use template.



4. Name the site and provide a description. SharePoint will create a group email address and a site address.

The screenshot shows the 'Give your site a name' step in the SharePoint Online setup process. On the left, there's a preview of a 'Standard team' site with a 'Change template' link. The main area contains instructions and input fields for the site name, description, group email address, and site address. The site name is 'Microsoft Training Team Site', the description is 'Use this site to share training files and discuss product features.', the group email address is 'MicrosoftTrainingTeamSite', and the site address is 'https://launchtrainingandconsulting.sharepoint.com/sites/MicrosoftTrai...'. All fields show a green confirmation message: 'The [field] is available.' At the bottom right are 'Back' and 'Next' buttons.

Give your site a name

Decide on a unique name that follows your organization's naming standards. The description is optional, but useful for people to understand what your site is for.

Your team site will be connected to a Microsoft 365 group, which gives your site a shared OneNote notebook, group email address, and team calendar.

Site name *
Microsoft Training Team Site
The site name is available.

Site description
Use this site to share training files and discuss product features.

Group email address *
MicrosoftTrainingTeamSite
The group alias is available.

Site address *
https://launchtrainingandconsulting.sharepoint.com/sites/ MicrosoftTrai...
The site address is available.

Standard team [Change template](#)

[Back](#) [Next](#)

5. Click Next.
6. Choose whether you would like to create a Public or Private site and select a default language. The language can be changed later.
7. Click Create site.

The screenshot shows the 'Set language and other options' step in the SharePoint Online setup process. On the left, there's a preview of a 'Standard team' site with a 'Change template' link. The main area contains instructions and dropdown menus for privacy settings and language. The privacy settings are set to 'Private - only members can access this site' and the language is set to 'English'. A note states: 'Select the default site language for your site. You can't change this later.' At the bottom right are 'Back' and 'Create site' buttons.

Set language and other options

Set the default language for your site. If required, select labels and other settings to classify what type of content is stored on your site and who should have access to the information.

Privacy settings
Private - only members can access this site

Select a language
English
Select the default site language for your site. You can't change this later.

Standard team [Change template](#)

[Back](#) [Create site](#)

You can add site members and owners now by typing their names. You can also add them later.

Add site owners and members

Consider assigning one additional site owner or a group to help manage site content. [Learn more about permissions](#)

Site owners have full control of site content, theme, permissions, hub associations, and other site settings.

Site members can edit and view site content, including files, pages, lists, and navigation.

Add members

Start typing a name

1 member to be added

James Storella
Owner

Standard team

Finish

Use the drop-down arrow to decide if each person you add will be a member or owner. It is recommended that you add more than one owner for times when the original owner is unavailable.

Add members

Start typing a name

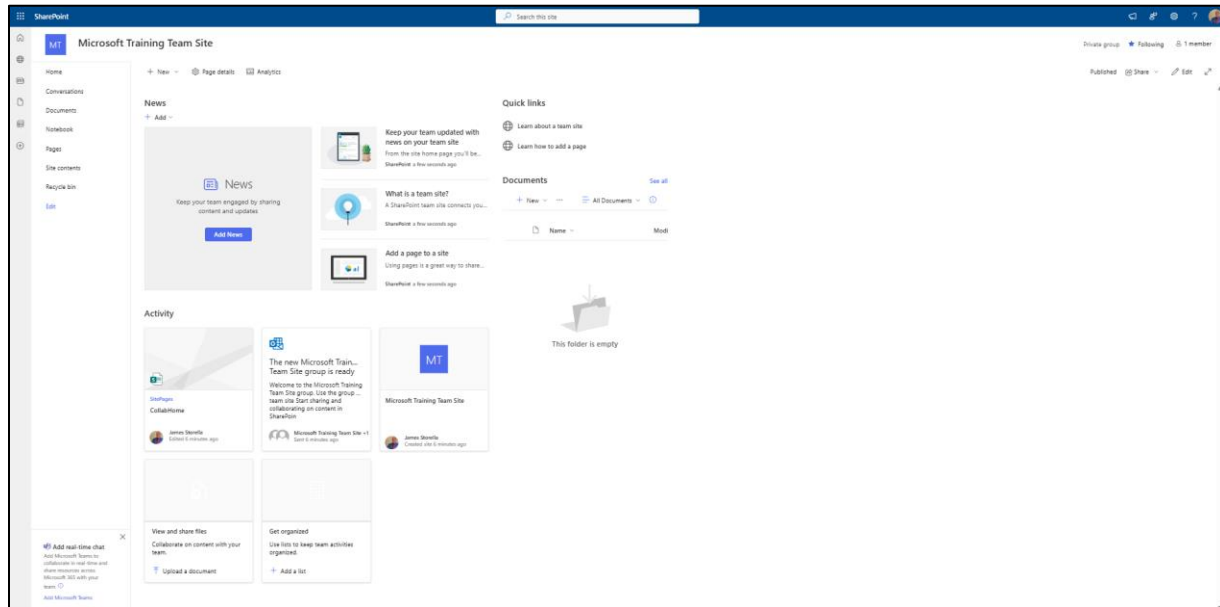
1 member to be added

James Storella
Member

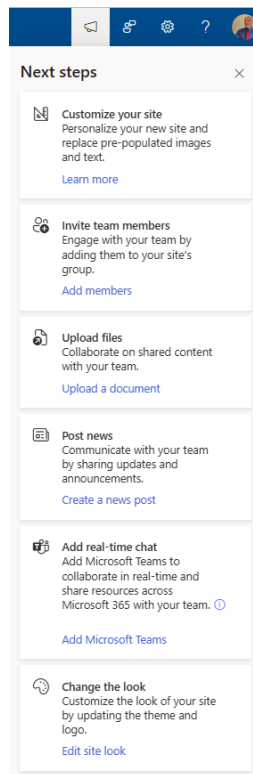
✓ Member
Owner

8. Click Finish.

Congratulations! You now have a team site!



Click the bullhorn icon in the title bar at the top to learn about ways to improve your site.

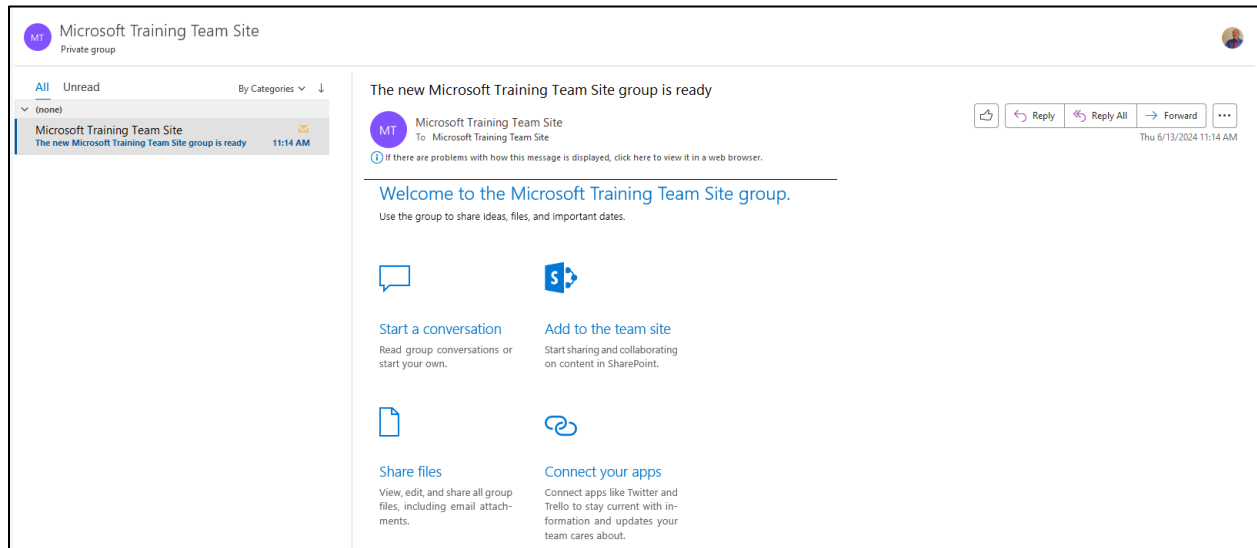


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www.LaunchTraining.com

Upon creating a site, you will receive an email with useful links in the mailbox that was set up for your group.



Members also receive an email in their Outlook email account with useful links.



Work Brilliantly Together

Welcome to the Microsoft Training Team Site Group

Use this site to share training files and discuss product features.

Private group with 0 members

[View group in Outlook](#)

Get started

You're set to receive only replies and events in your inbox. Change this setting below, or anywhere you see the group in Outlook, to see all of this group's conversations.

[Follow in inbox](#)



Get the conversation rolling

Start your own. Or just catch up. All in the group inbox.



Keep things together

Now, your documents and attachments in one place.



Stay on the same page

Groups that take notes together, stay together. In the group notebook.



Don't miss a thing

Track milestones (and everything in between) in the group calendar.



Getting Started with Microsoft SharePoint Online

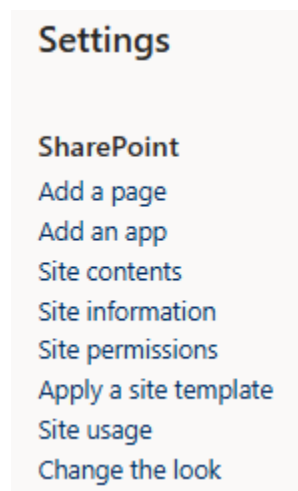
Lists

Creating a List in SharePoint

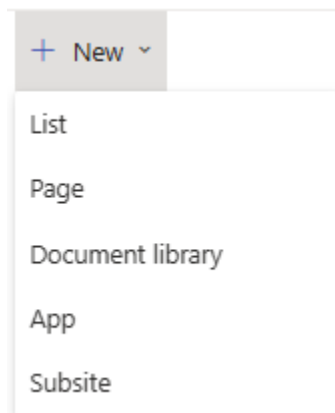
1. Click the Settings icon (gear) in the title bar.



2. Select Site contents.



3. Click the New button drop-down and select List.



4. Select a source for the information.

Create a list

Blank list From existing list From Excel From CSV

- Use Blank list to start from scratch.
 - Use From existing list when you want to use the fields that exist in another SharePoint list.
 - Use From Excel if you have the data stored in an Excel spreadsheet.
 - Use From CSV if the data is stored in a Comma Separated Values format.
5. For our example, we will use a Blank list, so click Blank list.
 6. Name your list and add a description.

Name *
Course Offerings

Description
Classes we offer to students.

☒ Show in site navigation

< Back Create Cancel

7. Click Create.

8. Click the Add column button to create the first field.

+ Add column

9. Choose a field type and click Next.

The screenshot shows the 'Create a column' dialog box in SharePoint Online. At the top left, there is a button labeled '+ Add column'. The main area is titled 'Create a column' and features a large 'T' icon above a text input field. Below the input field, it says 'Set a single line of text'. On the right side, there is a list of field types: 'Text' (selected with a 'T' icon), 'Choice' (with a checkmark icon), 'Date and time' (with a calendar icon), 'Multiple lines of text' (with a list icon), 'Person' (with a person icon), 'Number' (with a number 1 icon), and 'Yes/No' (with a yes/no icon). At the bottom left, there is a gear icon and the text 'Show or hide columns'. At the bottom right, there are two buttons: 'Next' (in blue) and 'Cancel' (in white with a grey border).

10. Fill in the information for the field and click Save.

Create a column ✕

[Learn more about column creation.](#)

Name *

Description

Type

Single line of text ▾

Default value

Enter a default value

☐ Use calculated value ⓘ

More options ▾

Maximum number of characters

255

Require that this column contains information

☐ No

Enforce unique values

☐ No

Add to all content types

☒ Yes

Column validation ▾

11. Repeat the process for each additional field.

When you are done, you can resize and view the list of fields with an icon to show the type of field.

📅 Course Name ▾ 📍 In-person or Virtual ▾ 📅 Date and Time ▾ 👤 Instructor ▾ 💰 Per Student Tuition ▾ 📅 Program ▾

Editing a Field/Column

1. Click the name of the field.
2. Select Column Settings.
3. Select Edit.
4. Make changes and click Save.

Edit column ×

[Learn more about column types and options.](#)

Name *

Description

Type

Choices *

In-person

×

Online

×

[+ Add Choice](#)

☐ Can add values manually ⓘ

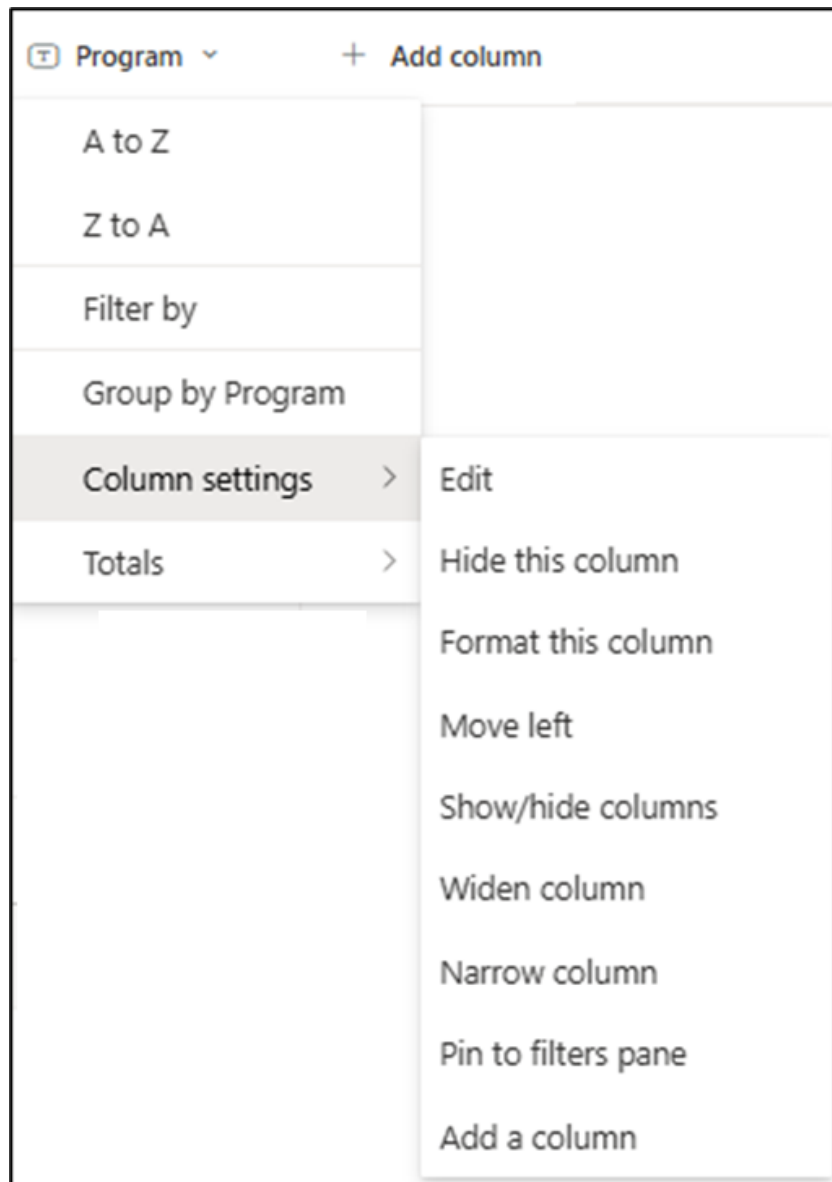
Default value

☐ Use calculated value ⓘ

[More options](#) ▾

Other Useful Column Settings

Other useful column settings include the ability to hide, format, move, widen, narrow, and pin a column.



Adding Items to a List

Now that you have a list, you can add items to the list.

1. Click the Add new item button.

+ Add new item

2. Fill in the fields and click Save.

The screenshot shows a 'New item' form in a SharePoint Online list. The form has a title bar with 'Copy link', a dropdown arrow, and a close button. The form fields are as follows:

- Course Number**: A text input field with the placeholder 'Enter value here'.
- Course Name ***: A text input field with the placeholder 'Enter value here'. Below it is the label 'Name of course as listed in the course catalog'.
- In-person or Virtual**: A checkbox that is checked, followed by a text input field with a placeholder '—'. Below it is the label 'Is the class being taught at our location or online?'.
- Date and Time**: A date picker with the placeholder 'Enter a date' and a time picker with the value '12:00 AM'. Below it is the label 'When will the class be held?'.
- Instructor**: A text input field with the placeholder 'Enter a name or email address'. Below it is the label 'Who is teaching the class?'.
- Per Student Tuition**: A text input field with the placeholder 'Enter a number'. Below it is the label 'Fee'.

At the bottom right of the form are two buttons: 'Save' and 'Cancel'.

3. Repeat the process until all items have been added to the list.

The list is now displayed in a grid.

Course Offerin... ☆						
Course Name	In-person or Virtual	Date and Time	Instructor	Per Student Tuition	Program	
Useful Features in Microsoft Outlook	Online	June 28	James Storella	\$299.00	Outlook	
Useful Features in Microsoft PowerPoint	Online	July 1		\$299.00	PowerPoint	
Introduction to Tableau	In-person	June 27	James Storella	\$999.00	Tableau	
Microsoft Excel Databases	In-person	June 5		\$299.00	Excel	
Getting Started with Microsoft Excel Formulas and Functions	Online	June 3	James Storella	\$299.00	Excel	
+ Add new item						

Editing an Item in the List

1. Hover over an item and click the circle that appears to the left of the item.

✓	Getting Started with Microsoft Excel Formulas and Functions	Online	June 3	James Storella	\$299.00	Excel
---	---	--------	--------	----------------	----------	-------

2. Click Edit in the bar above the list.

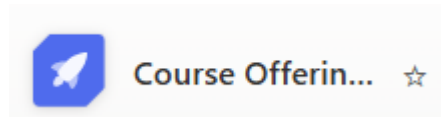
+ Add new item Edit Exit grid view Undo Share Copy link Comment Delete Automate ...

3. Use the form that appears to change the value.

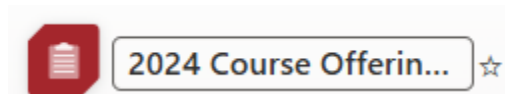
✓	Getting Started with Microsoft Excel Formulas and Functions	In-person	June 3	James Storella	\$299.00	Excel
---	---	-----------	--------	----------------	----------	-------

Changing the Name of the List, Color, and Graphic

1. Click the Name of the list.

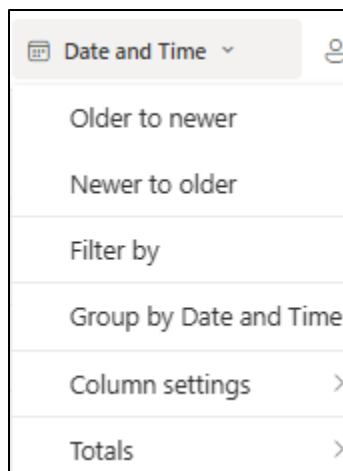


2. Change the values in the dialog box.



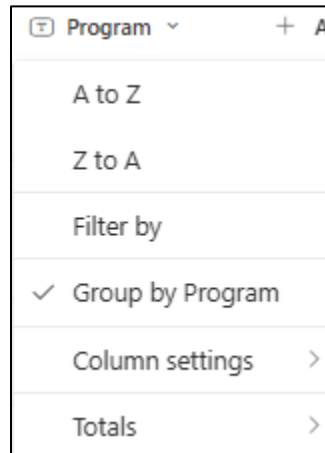
Sorting a List

1. Click the name of a field in the list to access the options.
2. Choose a sort order.

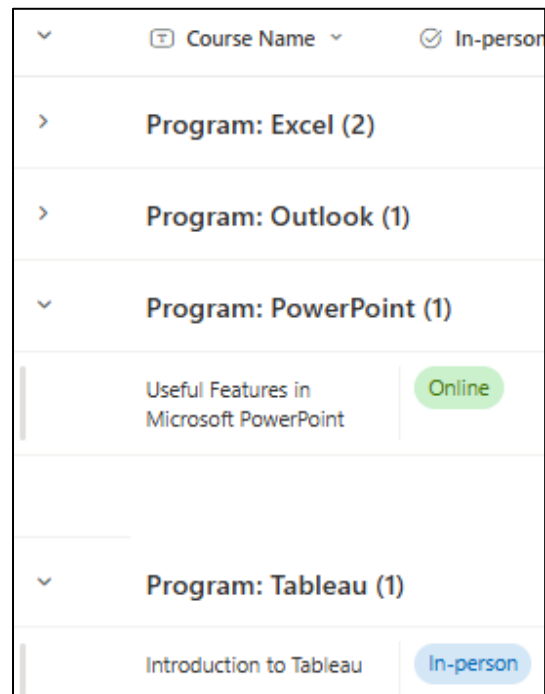
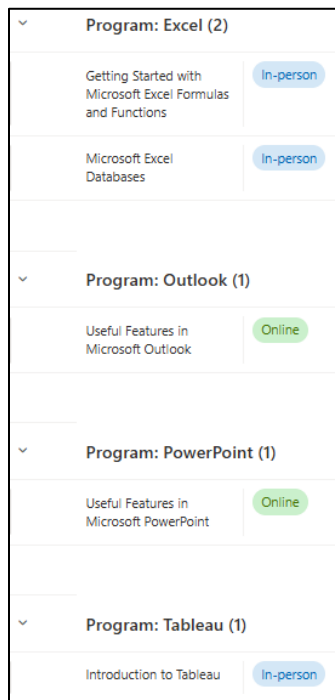


Grouping a List

1. Click the name of a field in the list to access the options.
2. Select Group by [Field Name].

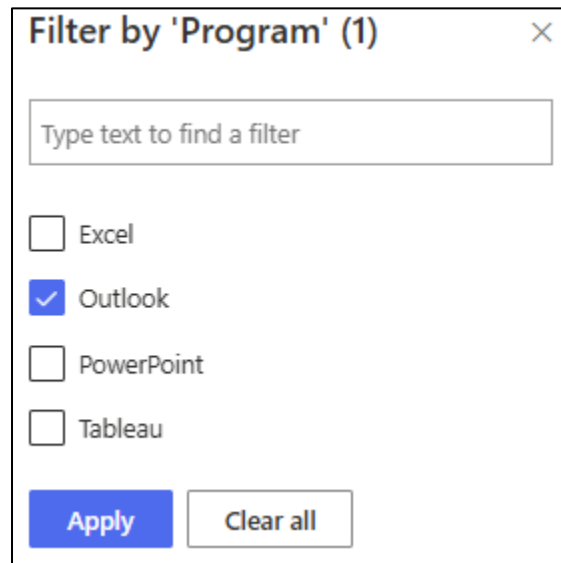


The list now creates groups for each value. The groups can be collapsed or expanded.



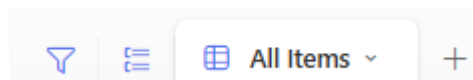
Filtering a List by a Single Field

1. Click the name of a field in the list to access the options.
2. Select Filter by.



Filtering a List by Multiple Fields

1. Select the Filter icon. It looks like a funnel.



2. Select values to filter the list by. The list now only shows those values. To remove the filter, click the Clear filters icon.



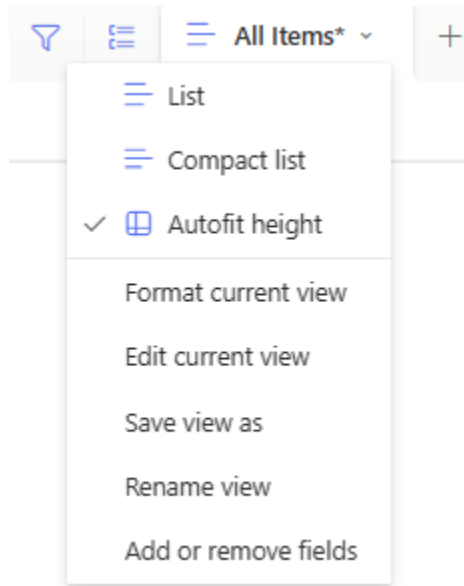
Adding a New Column to an Existing List

1. Click the Add column button to create additional fields.

+ Add column

Changing the Space between Records

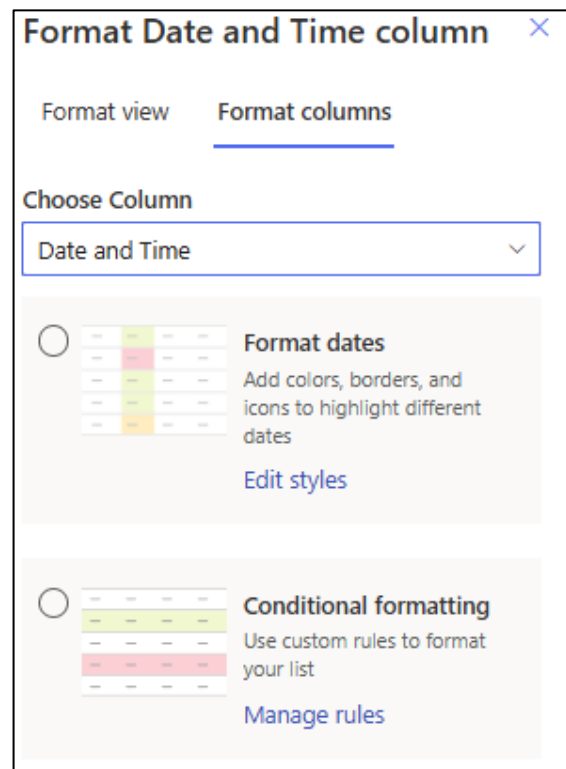
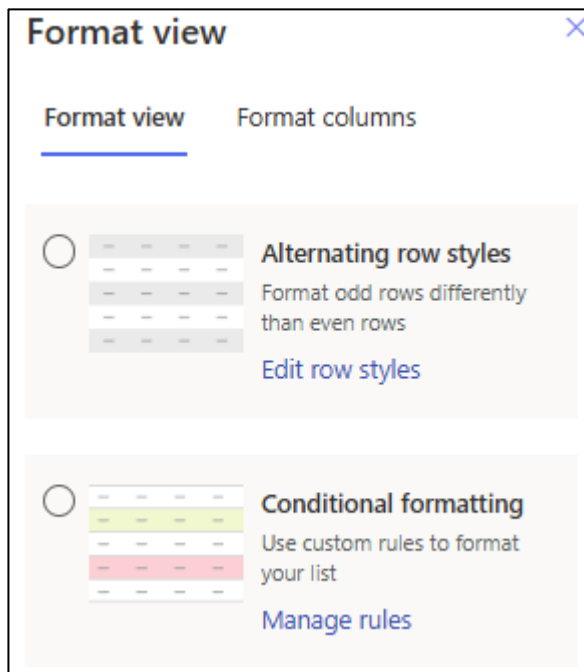
1. Click the list view icon.
2. Select List, Compact List, or Autofit height.



Formatting a View

SharePoint allows you to apply alternating row styles and conditional formatting to the whole view or to individual fields/columns.

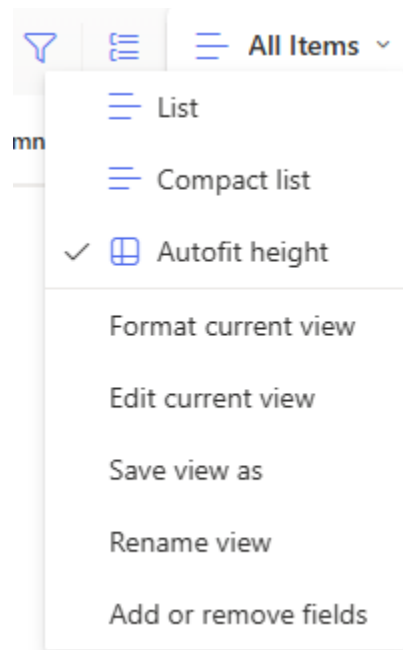
1. Click the list view icon.
2. Select Format current view.
3. Select Format view or Format columns.
4. Select an option.



Editing a View

SharePoint has an All Items view for lists, but you can also create your own views.

1. Click the list view icon.
2. Select Edit current view.



Here's one I created called My Customized View.

2024 Course Offerings ☆ ⓘ

This view uses filters that you [can view and edit here](#). Clear filters ×

Course Name	Date and Time	Instructor	In-person or Online	Program	+ Add column
Getting Started with Microsoft Excel Formulas and Functions	June 03	James Storella	In-person	Excel	
Useful Features in Microsoft Outlook	June 28	James Storella	Online	Outlook	
Useful Features in Microsoft PowerPoint	July 01		Online	PowerPoint	
Introduction to Tableau	June 27	James Storella	In-person	Tableau	

Count 4

Options for views include: Columns, Sort, Filter, Tabular View, Group by, Totals, Style, Folders, Item Limit, and Mobile.

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MT

EDIT LINKS

Settings • Edit View

Home

Conversations

Documents

Notebook

Pages

Site contents

Recent

2024 Course Offerings

Recycle Bin

EDIT LINKS

Name

Type a name for this view of the list. Make the name descriptive, such as "Sorted by Author", so that site visitors will know what to expect when they click this link.

View Name:

My Customized View

Web address of this view:

https://launchtrainingandconsulting.sharepoint.com/sites/MicrosoftTrainingTeamSite/Lists/CourseOffering/MyCustomizedView.aspx

This view appears by default when visitors follow a link to this list. If you want to delete this view, first make another view the default.

Columns

Select or clear the check box next to each column you want to show or hide in this view of this page. To specify the order of the columns, select a number in the Position from left box.

Display	Column Name	Position from Left
☒	Course Name	1
☒	In-person or Online	2
☒	Date and Time	3
☒	Instructor	4
☐	Per Student Tuition	5
☒	Program	6
☐	App Created By	7
☐	App Modified By	8

Sort

Select up to two columns to determine the order in which the items in the view are displayed. [Learn about sorting items.](#)

First sort by the column:

Program

☒

1

2

3

Show items in ascending order (A, B, C, or 1, 2, 3)

☐

3

2

1

Show items in descending order (C, B, A, or 3, 2, 1)

Then sort by the column:

Date and Time

☒

1

2

3

Show items in ascending order (A, B, C, or 1, 2, 3)

☐

3

2

1

Show items in descending order (C, B, A, or 3, 2, 1)

☐ Sort only by specified criteria (folders may not appear before items).

Filter

Show all of the items in this view, or display a subset of the items by using filters. To filter on a column based on the current date or the current user of the site, type **[Today]** or **[Me]** as the column value. Use indexed columns in the first clause in order to speed up your view. Filters are particularly important for lists containing 5,000 or more items because they allow you to work with large lists more efficiently. [Learn about filtering items.](#)

☐

Show all items in this view

☒

Show items only when the following is true:

Show the items when column

Instructor

is equal to

James Storella

☐ And
 ☒ Or

When column

In-person or Online

is equal to

Online

Getting Started with Microsoft SharePoint Online

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Group By

Select up to two columns to determine what type of group and subgroup the items in the view will be displayed in. [Learn about grouping items.](#)

First group by the column:

None

☒  Show groups in ascending order (A, B, C, or 1, 2, 3)

☐  Show groups in descending order (C, B, A, or 3, 2, 1)

Then group by the column:

None

☒  Show groups in ascending order (A, B, C, or 1, 2, 3)

☐  Show groups in descending order (C, B, A, or 3, 2, 1)

By default, show groupings:

☒ Collapsed ☐ Expanded

Number of groups to display per page:

30

Totals

Select one or more totals to display.

Column Name

Course Name
Date and Time (Average supported in datasheet view only)
In-person or Online
Instructor
Program

Total

Count
None
None
None
None

Style

Choose a style for this view from the list on the right.

View Style:

Basic Table
Boxed, no labels
Boxed
Newsletter
Newsletter, no lines
Shaded
Preview Pane
Default

Folders

Specify whether to navigate through folders to view items, or to view all items at once.

Folders or Flat:

☒ Show items inside folders
☐ Show all items without folders

Item Limit

Use an item limit to limit the amount of data that is returned to users of this view. You can either make this an absolute limit, or allow users to view all the items in the list in batches of the specified size. [Learn about managing large lists.](#)

Number of items to display:

☒ Display items in batches of the specified size.
☐ Limit the total number of items returned to the specified amount.

Mobile

Adjust mobile settings for this view.

☒ Enable this view for mobile access
 (Applies to public views only)
☒ Make this view the default view for mobile access
 (Applies to public views only)

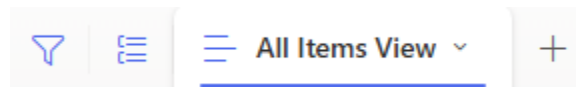
Number of items to display in list view web part for this view:

Field to display in mobile list simple view:

Web address for this mobile view:
https://launchtrainingandconsulting.sharepoint.com/sites/MicrosoftTrainingTeamSite/_layouts/15/mobile/viewa.aspx?List=ec1c4ae6%2D154d%2D462d%2Db982%2D0f4394cbd7bb&View=ef522020%2Dce14%2D4834%2D9628%2Dd686b8116b76

Creating Other Types of Views

1. Click the Add a view icon. It looks like a plus sign.



Name the view and choose the type of view.

Create view ✕

View name *

Add a view name here

Show as

☒ List
 ☐ Calendar
 ☐ Gallery
 ☐ Board

Visibility ⓘ

☒ Make this a public view

Create view

×

View name

Class Calendar

Show as

List

Calendar

Gallery

Board

Default layout

Month

Week

Work week

Day

Start date on calendar

End date on calendar

Date and Time

Date and Time

Visibility ⓘ

☒ Make this a public view

More options ▾

Create

Cancel

2024 Course Offerings ☆ ⓘ							All Items View	Class Calendar ▾
Today ↑ ↓ June 2024 ▾							Wed, Jun 5 Unscheduled	
Sunday May 26	Monday 27	Tuesday 28	Wednesday 29	Thursday 30	Friday 31	Saturday Jun 1	12:00 AM 0 min Microsoft Excel Databases	
2	3 9 AM Getting Started w...	4	5 12 AM Microsoft Excel D...	6	7	8		
9	10	11	12	Jun 13	14	15		
16	17	18	19	20	21	22		
23	24	25	26	27 9 AM Introduction to Ta...	28 9 AM Useful Features in ...	29		

Create view

View name

Class Gallery

Show as

List

Calendar

Gallery

Board

Visibility ⓘ

☒ Make this a public view

Create

Cancel

+ Add new item
 Edit in grid view
 Undo
 Share
 Export
 Forms **New**
 Automate
 Integrate
 ...

Manage access

2024 Course Offerings ☆ ↻

All Items View
 Class Calendar
 Class Gallery

Instructor James Storella Course Number 101 Course Name Getting Started with Microsoft E... Date and Time June 03 In-person or Online In-person Program Excel	Instructor — Course Number 102 Course Name Microsoft Excel Databases Date and Time June 05 In-person or Online In-person Program Excel	Instructor James Storella Course Number 201 Course Name Introduction to Tableau Date and Time June 27 In-person or Online In-person Program Tableau	Instructor — Course Number 302 Course Name Useful Features in Microsoft Pow... Date and Time July 01 In-person or Online Online Program PowerPoint	Instructor James Storella Course Number 502 Course Name Useful Features in Microsoft Out... Date and Time June 28 In-person or Online Online Program Outlook
---	--	---	--	--

Create view

×

View name

Class Board

Show as

List

Calendar

Gallery

Board

Organize board by *

In-person or Online

▼

Visibility ⓘ

☒ Make this a public view

Create

Cancel

Create view

×

View name

Course Board

Show as

List

Calendar

Gallery

Board

Organize board by *

In-person or Online

▼

Visibility ⓘ

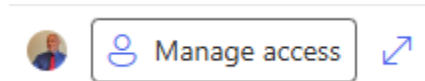
☒ Make this a public view

Create

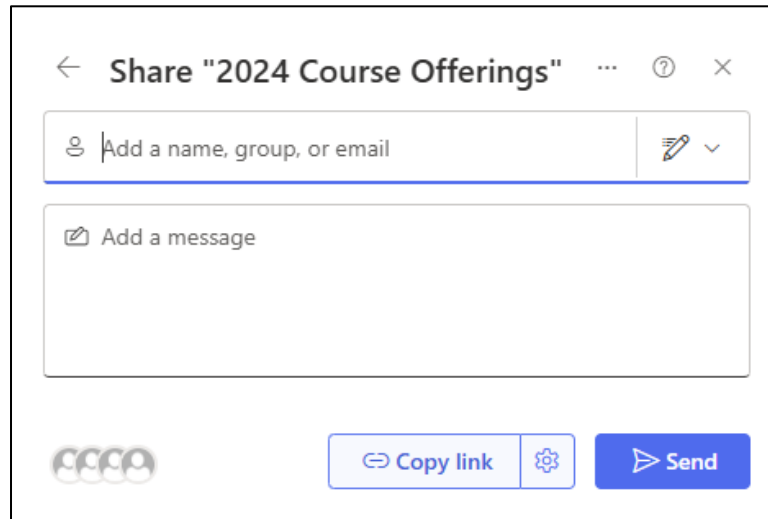
Cancel

Sharing a List

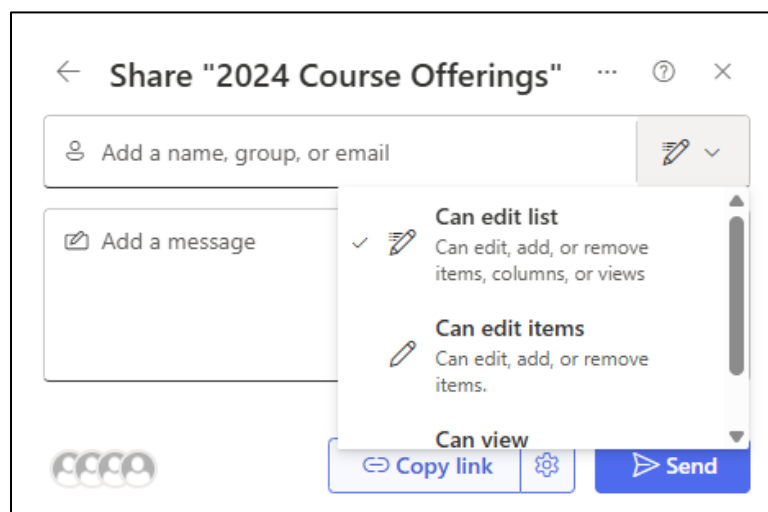
1. Click the Manage access button.



2. Click Share.



3. Enter the names or email addresses of the people you want to share the list with.
4. Add a message if you like.
5. Use the drop-down to determine what the users have permission to do.



6. Click Send.

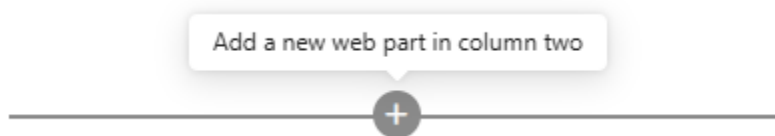
Adding a List to a Page

Now that you have created a list, you can add it to a page. To modify the page, you need to get into Edit mode and add a new web part. Then you can choose the list.

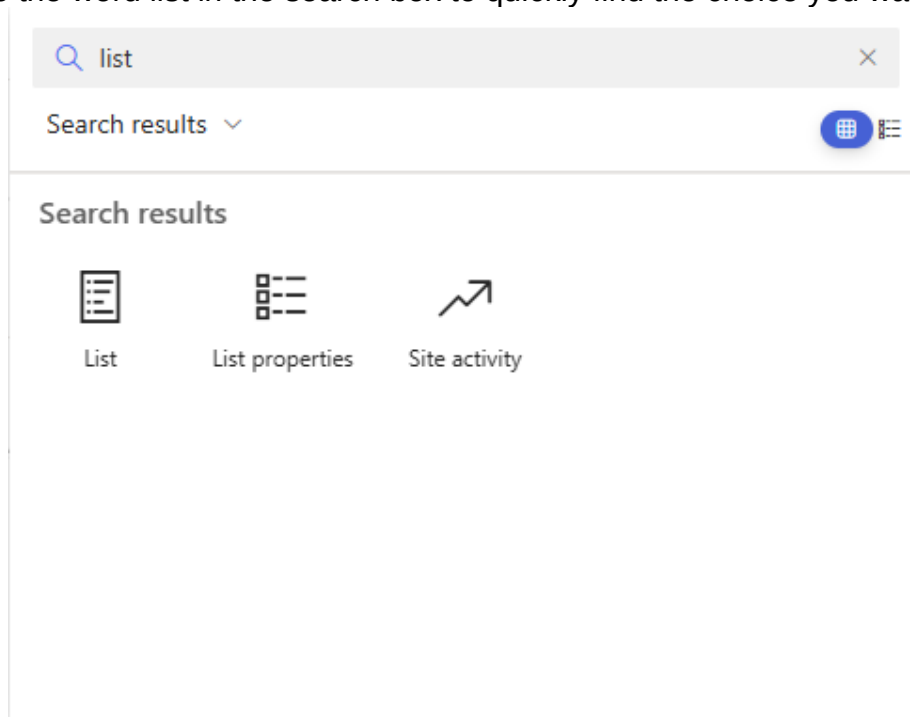
1. Click the Edit link.



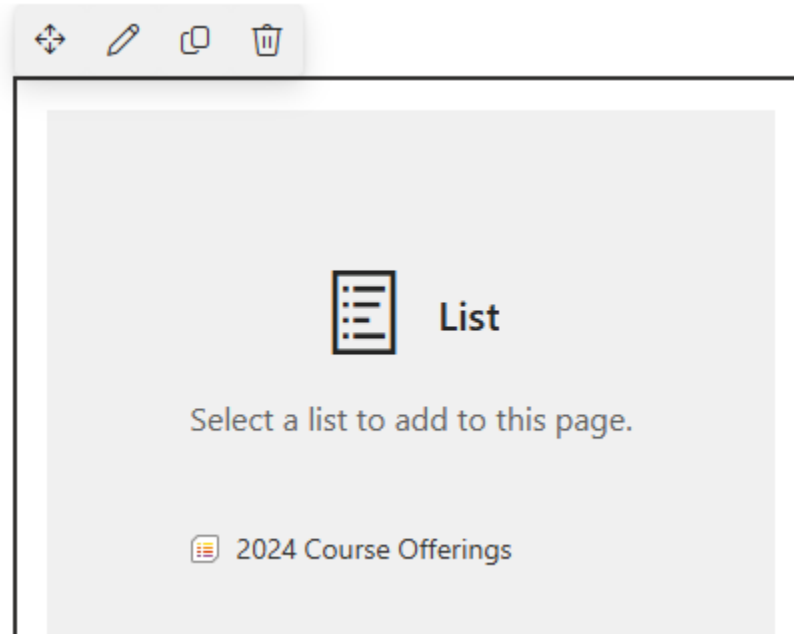
2. Move your cursor across the page in the location where you want the list to appear. A line with a plus sign appears. Click the plus sign.



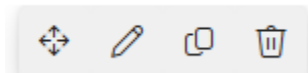
3. Type the word list in the search box to quickly find the choice you want.



4. Select List.
5. Choose the name of the list you want to add.



6. Click the Edit web part icon (pencil).



7. Choose the options you want.

List ×

List

2024 Course Offerings ▼

View

All Items View ▼

Folder

Type the folder name.

For nested folders, type the path separated by '/'.

Size

Autosize - fit to number of items ▼

☐

 Show command bar

☐

 Show "See all" button

Dynamic filtering
Filter by items selected in another list or library
[Learn More](#)

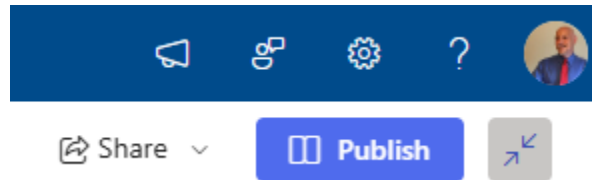
☐

 Off

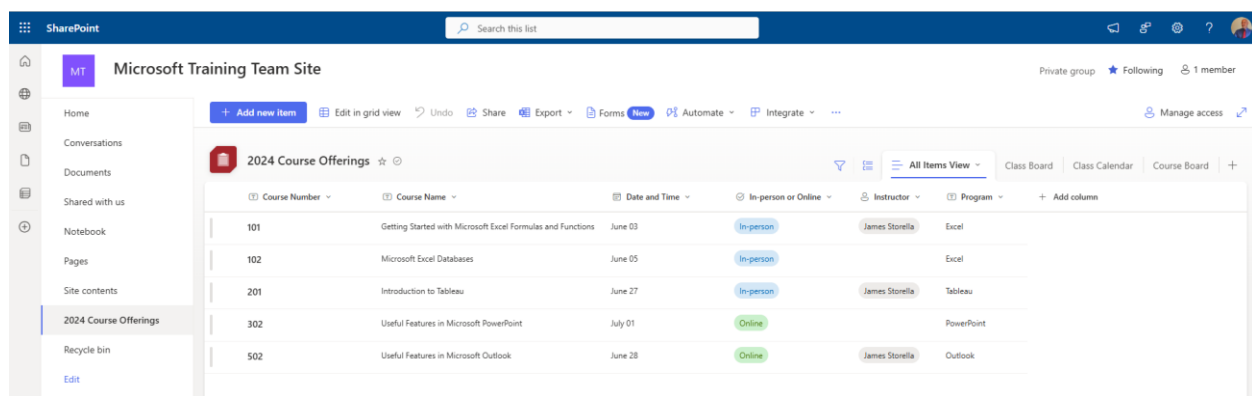
8. Click Save as draft to see how it looks.



9. Click the Publish button.



You can now view the list.

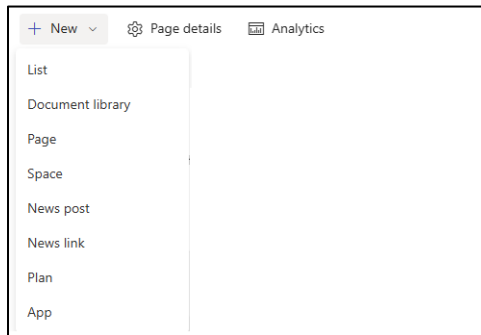


Course Number	Course Name	Date and Time	In-person or Online	Instructor	Program
101	Getting Started with Microsoft Excel Formulas and Functions	June 03	In-person	James Storella	Excel
102	Microsoft Excel Databases	June 05	In-person		Excel
201	Introduction to Tableau	June 27	In-person	James Storella	Tableau
302	Useful Features in Microsoft PowerPoint	July 01	Online		PowerPoint
502	Useful Features in Microsoft Outlook	June 28	Online	James Storella	Outlook

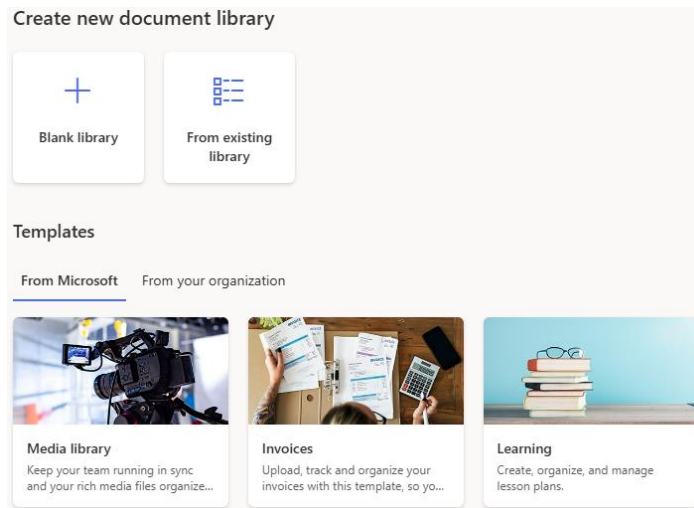
Libraries and Documents

Creating a Document Library

1. Select the New drop-down list on the menu bar.



2. Select Document Library.
3. Choose whether the document library is being created from scratch, from an existing library, or from a template.



4. Name the library and add a description. It is a good idea to keep the names of SharePoint sites, subsites, libraries, lists, folders, and files short with no spaces and no special characters. Instead, consider using CamelFormat. That's when you use capitalization to indicate separate words. You can change the display name later.

Two side-by-side screenshots of the SharePoint 'Create' dialog box. The left dialog shows the 'Name' field with the placeholder 'Add a name here' and the 'Description' field with the placeholder 'Writing a description can help others know more about your library.' The right dialog shows the 'Name' field with the value 'TrainingFiles' and the 'Description' field with the value 'This is a list of files that are commonly used when teaching a class.' Both dialogs have a 'Show in site navigation' checkbox checked and 'Create' and 'Cancel' buttons.

Creating Folders in a Document Library

While it is possible to add folders to a document library, it is not recommended. Instead consider using metadata for better search results. Here is one article that discusses this topic: [Why You Should Stay Away From Folders in SharePoint Online – Roland Wanner](#). You can also find articles that recommend how to use folders if you just can't resist.

1. Click the new drop-down menu and select Folder.
2. Name the folder and select a color.

A screenshot of the 'Create a folder' dialog box. It shows the 'Name' field with the placeholder 'Enter your folder name' and the 'Folder color' section with a grid of 16 color options. The 'Create' button is highlighted.

Training Files 				
 Name ▾	Modified ▾	Modified By ▾	+ Add column	
 Access	 About a minute ago	James Storella		
 Excel	 A few seconds ago	James Storella		
 OneNote	 A few seconds ago	James Storella		
 PowerPoint	 A few seconds ago	James Storella		

Uploading a Document to a Library

One way to get files into a SharePoint document library is to save files to the document library from the programs you use. Simply click the File tab in programs like Word, Excel or PowerPoint and select Save As. Then, select SharePoint. Choose the team site. Navigate to the document library and select the appropriate folder if you have created folders. Name the file and click Save.



Sites - Launch Training
 jdstorella@launchtraining.com



Microsoft Training Team Site


 Training Files

6/18/2024 12:11 AM


 Excel

6/18/2024 12:11 AM

↑  Microsoft Training Team Site > TrainingFiles > Excel

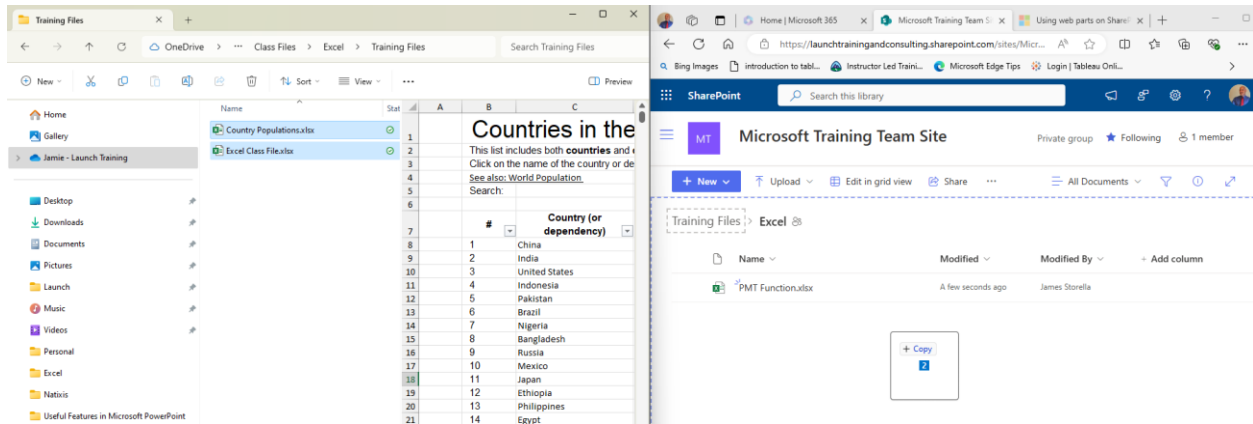
PMT Function

Excel Workbook (*.xlsx)

 Save

When working in SharePoint, you can upload files from File Explorer or directly from the SharePoint interface. If you have existing files you want to add to the library, you need to upload them. One simple way is to open File Explorer and drag files into this window. A box appears with the number of files that are being copied.

Getting Started with Microsoft SharePoint Online

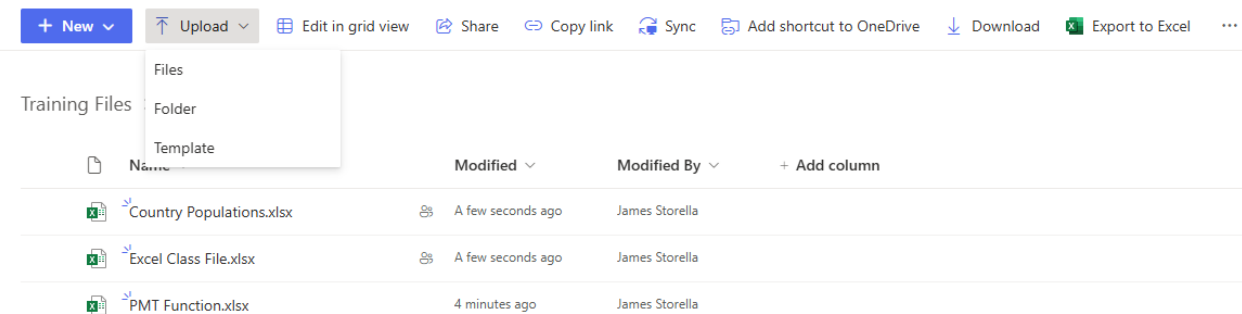


The new files then appear in the library.

Training Files > Excel

Name	Modified	Modified By	+ Add column
Country Populations.xlsx	A few seconds ago	James Storella	
Excel Class File.xlsx	A few seconds ago	James Storella	
PMT Function.xlsx	4 minutes ago	James Storella	

Another way to add an existing file to a library is to click Upload and select Files, Folder or Template.



Navigate to the file you want, select it, and click Open.

Note: You can select multiple files using the Shift key to select contiguous files or the Ctrl key to select noncontiguous files and add them all at the same time.

The file(s) are now uploaded to the library.

+ New Upload Edit in grid view Share Copy link Sync Add shortcut to OneDrive Download Export to Excel			
Training Files > Excel			
Name	Modified	Modified By	+ Add column
Power Query.xlsx	A few seconds ago	James Storella	
Country Populations.xlsx	2 minutes ago	James Storella	
Excel Class File.xlsx	2 minutes ago	James Storella	
PMT Function.xlsx	6 minutes ago	James Storella	

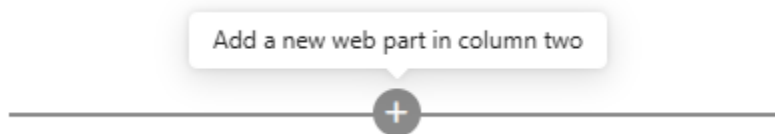
Adding a Library to a Page

Now that you have created a library, you can add it to a page. To modify the page, you need to get into Edit mode and add a new web part. Then you can choose the list.

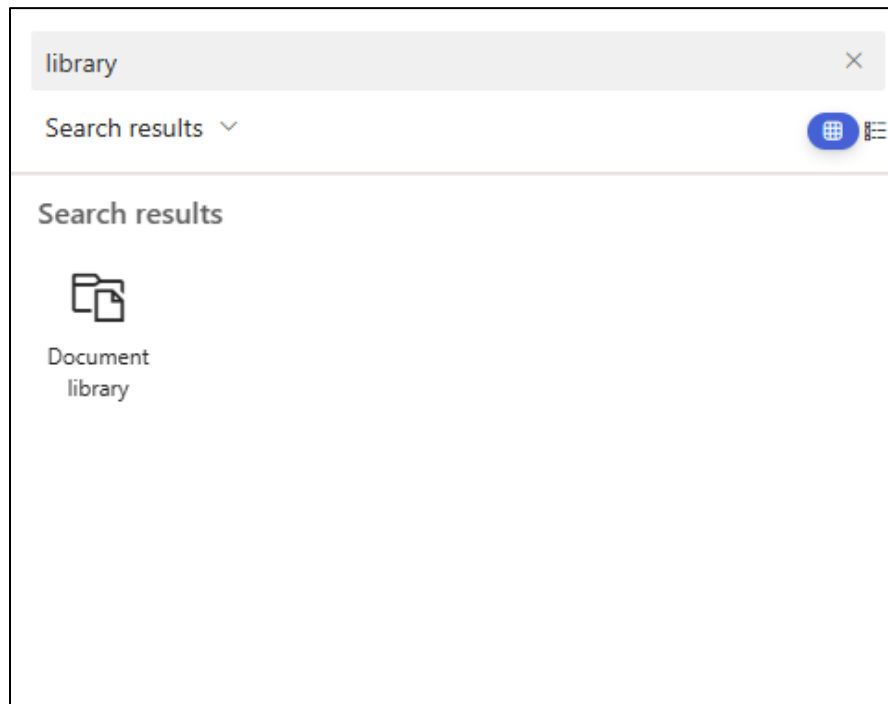
1. Click the Edit link.



2. Move your cursor across the page in the location where you want the list to appear. A line with a plus sign appears. Click the plus sign.

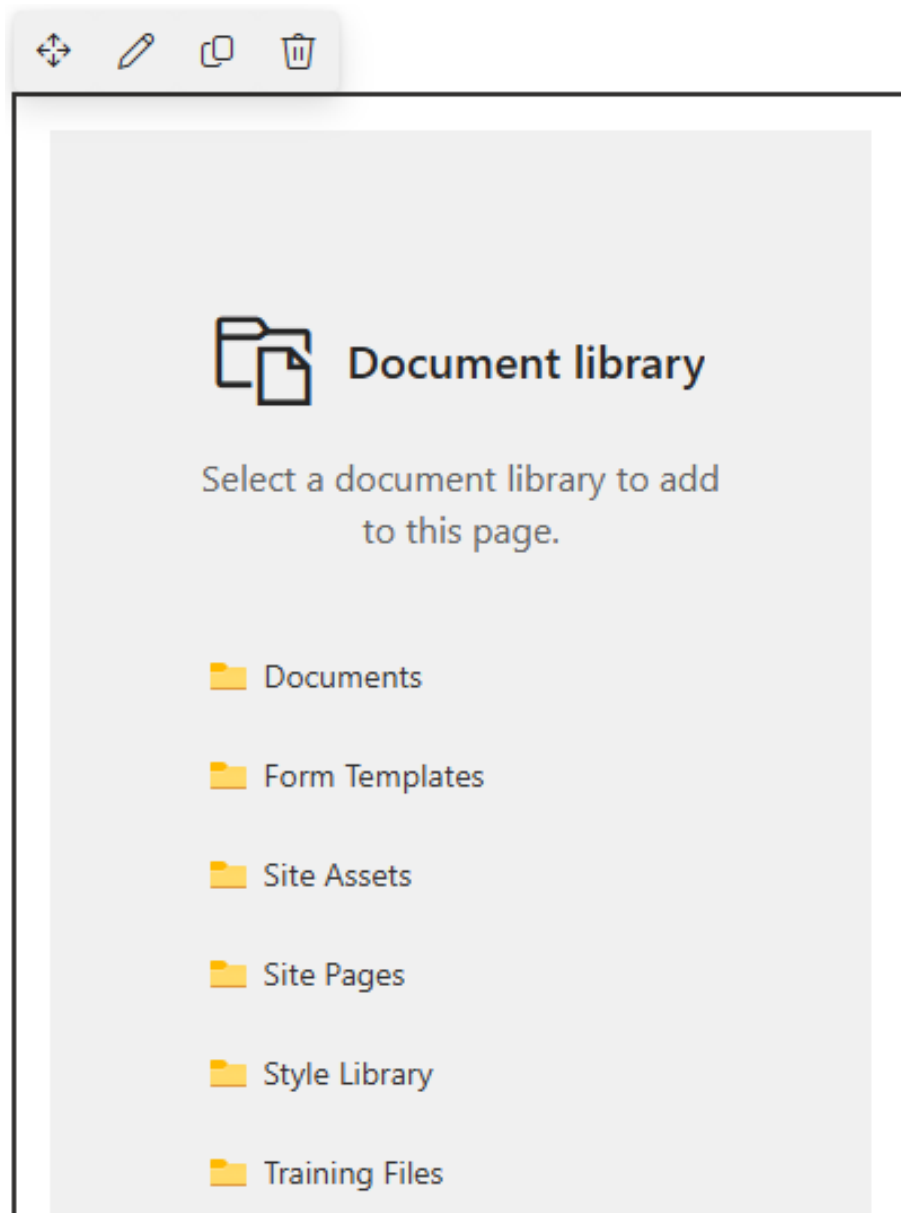


3. Type the word list in the search box to quickly find the choice you want.



4. Select Document library.

5. Choose the name of the library you want to add.



6. Click the Edit web part icon (pencil).



7. Choose the options you want.

Document library ×

Document library

Size

Medium - about 15 items

☐ Show command bar

☐ Show "See all" button

Dynamic filtering

Filter by items selected in another list or library

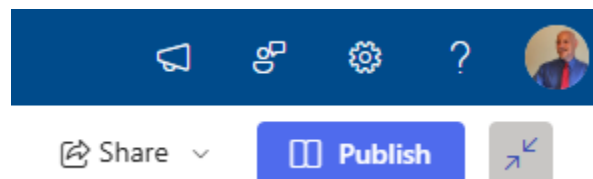
[Learn More](#)

☐ Off

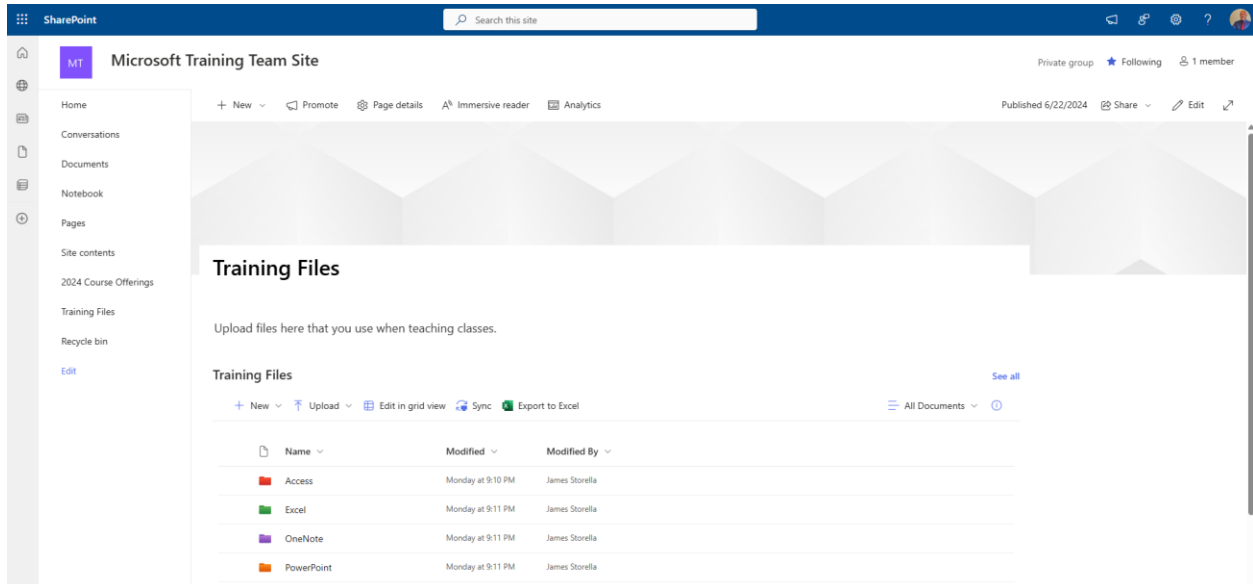
8. Click Save as draft to see how it looks.



9. Click the Publish button.



You can now view the library.



Retrieving a Document from a Library

To open a document that is stored in a document library, click the name of the document.

Previewing a Document in a Library

If you are not sure what the contents of a document are, click the ellipsis (...) next to the name of the document. Select Preview. A preview of the document helps you to see what is contained in the document.

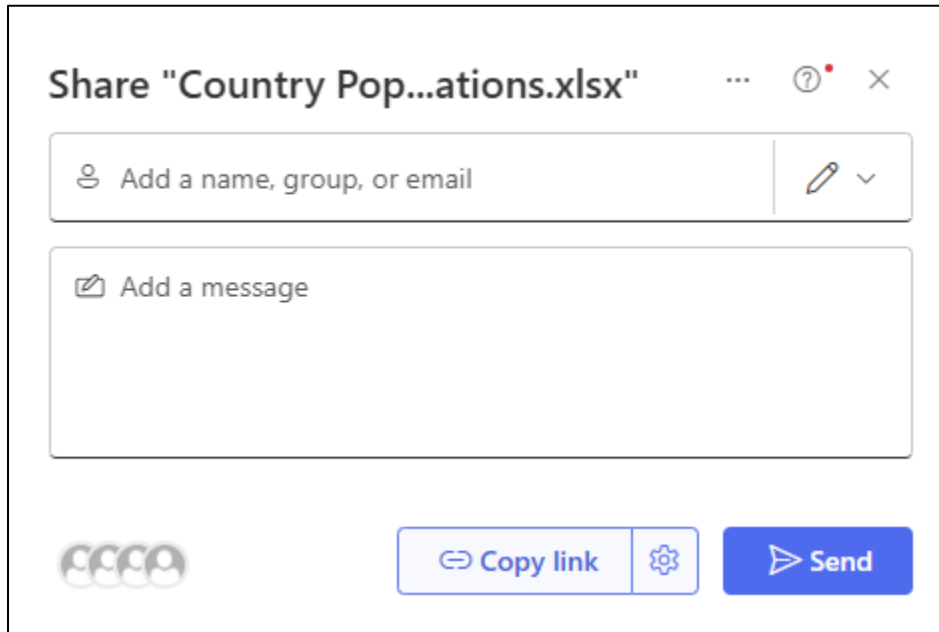
Sharing a File from a Document Library

1. Click the dot to the left of the name of a document.
2. Click the Share icon.



3. Type a name, group, or email address.
4. Choose whether the person will be able to edit or view the document.
5. Add a message if you want to the email they will receive.

6. Click the Send button.



Share "Country Pop...ations.xlsx" ... ? x

👤 Add a name, group, or email

✍ Add a message

👤👤👤👤

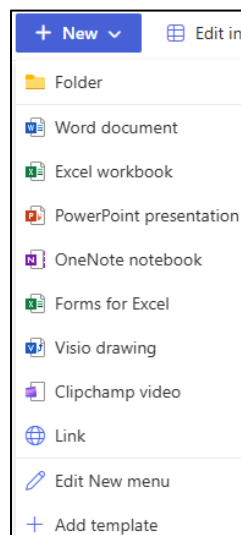
🔗 Copy link ⚙

➤ Send

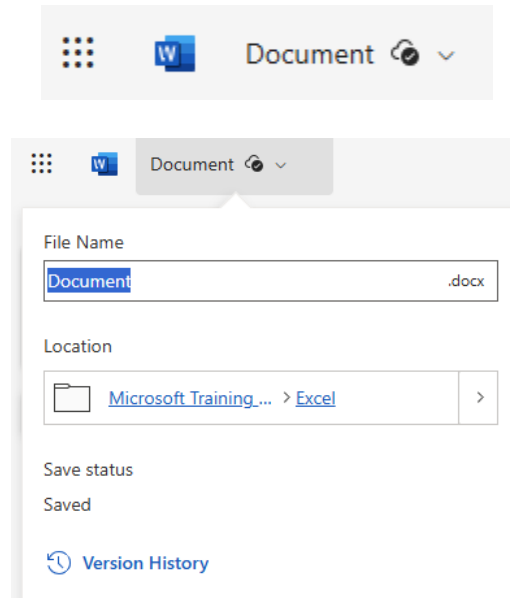
Creating a Document in a Library

You can create a brand-new document from within a library.

1. Click the New icon and select the type of document you want to create.



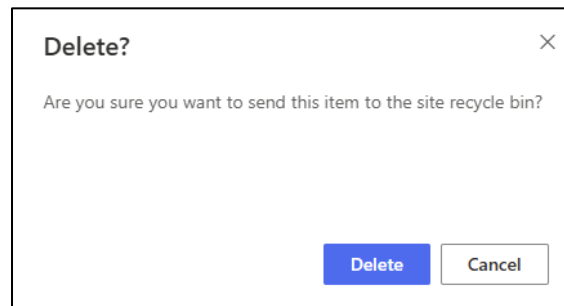
2. Once the file has been created, click the location where the name appears above the ribbon and enter a name for the document.



3. The document automatically saves. Close the tab to return to SharePoint.

Deleting a Document from a Library

1. Click the ellipsis (...) to the right of the document name and select Delete.
2. Confirm the deletion of the document.

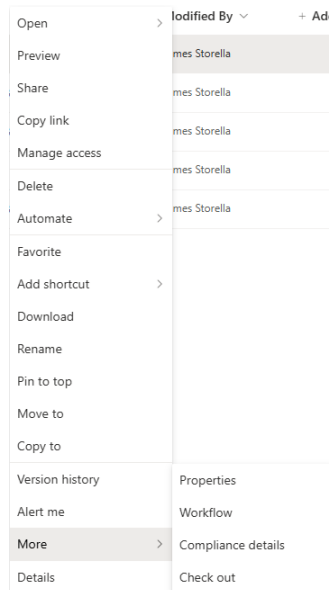


Checking a Document In and Out of a Library

If you want to have better document control, you can require users to check documents in and out of the library in order to make changes to the document.

Checking a Document Out

1. Click the ellipsis (...) to the right of the name of the document.
2. Select More and then select Check Out.



The icon next to the document name now displays an arrow indicating it is checked out.



Checking a Document Back In

When you are done editing the document, repeat the process you used to check the document out, but instead, select Check In. A dialog box appears where you can explain what change you made to the document. Add a note and click Check in. The red icon is no longer displayed.

Check in Country Populations.xlsx

Comment

Type comments describing what has changed in this version.

Check in

Check in Country Populations.xlsx

Comment

I updated the list with the latest population numbers.

Check in

It is very important to make sure you check the document back in. Other users who would ordinarily have access to the document will not be able to see any changes you made if you don't. The document will open as read-only as the version of the document before you started to make changes.

Moving and Copying Documents

Documents can be moved or copied to new locations.

1. Click the ellipsis next to the file name.
2. Select Move to or Copy to.
3. Navigate to the location and select Move here or Copy here.

Using Versioning

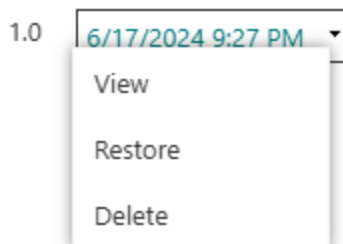
As changes are made to files, versions are created. You can view the different versions of the document by clicking the ellipsis next to the name of the document and selecting Version history.

Version history

Delete All Versions

No. ↓	Modified	Modified By	Size	Comments
3.0	6/17/2024 10:02 PM	☐ James Storella	37.7 KB	
2.0	6/17/2024 9:52 PM	☐ James Storella	38.8 KB	I updated the list with the latest population numbers.
1.0	6/17/2024 9:27 PM	☐ James Storella	38.8 KB	

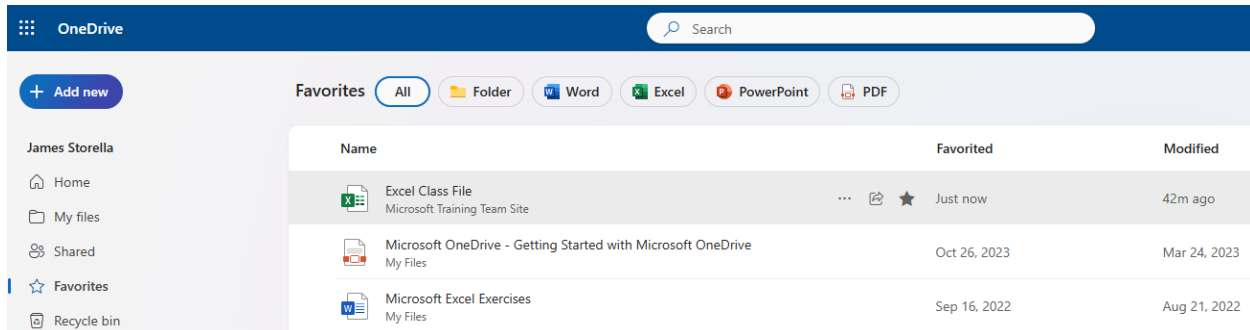
When you hover over the date and time of the modification, you can access a drop-down list that you can use to view, restore, or delete a version.



Favoriting a Document

Favoriting a document makes it easier to access. The document is added to the list of favorite files in OneDrive.

To remove the file from your list of favorite files, click the star icon to the right of the name of the file.



Using Alerts to Notify Changes Were Made to a Specific File, Link or Folder

You can request an alert if a change is made to a file, link, or folder. An email or text message is sent to you when a change is made. You can even select to receive daily or weekly summaries of changes at a specific time and/or day.

1. Open the document library.
2. Hover over the item you are interested in.
3. Click the check mark.
4. Click the ellipsis (...) on the right and select Alert Me.
5. Set the options for the Alert.

Alert me when items change

OKCancel

Alert Title
Enter the title for this alert. This is included in the subject of the notification sent for this alert.

Training Files: Excel Class File.xlsx

Send Alerts To
You can enter user names or e-mail addresses. Separate them with semicolons.

Users:
James Storella x

Delivery Method
Specify how you want the alerts delivered.

Send me alerts by:

☒ E-mail jdstorella@launchtraining.com

☐ Text Message (SMS)

☐ Send URL in text message (SMS)

Send Alerts for These Changes
Specify whether to filter alerts based on specific criteria. You may also restrict your alerts to only include items that show in a particular view.

Send me an alert when:

☒ Anything changes

☐ Someone else changes a document

☐ Someone else changes a document created by me

☐ Someone else changes a document last modified by me

When to Send Alerts
Specify how frequently you want to be alerted. (mobile alert is only available for immediately send)

☒ Send notification immediately

☐ Send a daily summary

☐ Send a weekly summary

Time:
Saturday 9:00 AM

You receive an email indicating the alert has been created.

You have successfully created an alert for 'Excel Class File.xlsx'

 SharePoint Online <no-reply@sharepointonline.com>
To James Storella

  Reply  Reply All  Forward  

Sat 6/22/2024 12:35 PM

Alert 'Excel Class File.xlsx' has successfully been added on ['Microsoft Training Team Site'](#).

You will receive alerts according to the delivery method, timing and criteria that were selected when the alert was created.

You can change this alert or any of your other alerts on the [My Alerts on this Site](#) page.

You then receive an email (or text) when a change is made.



Note: You can use this same process to get alerts for changes made to an item in a list!

Searching

When you conduct a search in SharePoint, it compares your search term to an index that SharePoint creates. SharePoint creates this index by *crawling* your database every fifteen minutes by default (but this can be changed). Since there is a time between crawls, a search may not contain newly added information and may continue to show recently deleted information.

Search results are also determined by permissions. The owner of the site can set permissions for what can and cannot be searched. By default, all site content can appear in search results. The person who is viewing search results must have permission to view the content. If you prevent the content of a site from appearing in search results, the content of all subsites is also blocked from appearing in search results.

Controlling Whether Content Can Be Searched

1. Select Settings>Site information.



2. Select View all site settings.
3. In the Search group, select Search and offline availability.
4. In the Indexing Site Content section, select Yes or No.

Indexing Site Content Specify whether this site should be visible in search results. If a site is not visible to search, then content from that site and all of its subsites will not appear in search results.	Allow this site to appear in search results? ☒ Yes ☐ No
--	--

Controlling What Items in Lists or Libraries Appear in Searches

1. Select Settings>Site information.



2. Select View all site settings.
3. In the Site Administration group, select Site Libraries and lists.
4. Select Customize [Name of List or Library].
5. In the General Settings group, select Advanced settings.

6. In the Search section, choose whether or not items from the list or library can appear in search results.

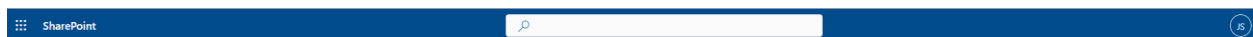
Search Specify whether this list should be visible in search results. Users who do not have permission to see these items will not see them in search results, no matter what this setting is.	Allow items from this list to appear in search results? ☒ Yes ☐ No
--	--

Search Specify whether this document library should be visible in search results. Users who do not have permission to see these items will not see them in search results, no matter what this setting is.	Allow items from this document library to appear in search results? ☒ Yes ☐ No
--	--

Searching a SharePoint Site

There are several types of searches you can do in SharePoint. The search includes the current site as well as any subsites of the current site.

1. Use the Search bar to search for pages or lists or libraries or items in lists or libraries.



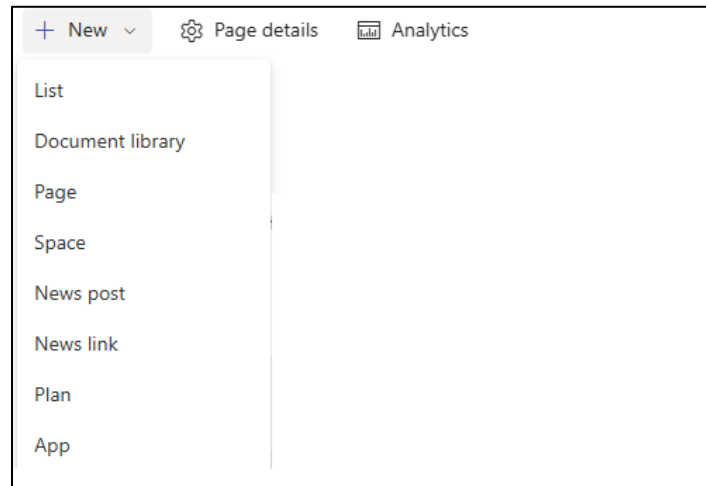
Search results may differ for different people based on the permissions they have and the searches they have conducted in the past.

Pages

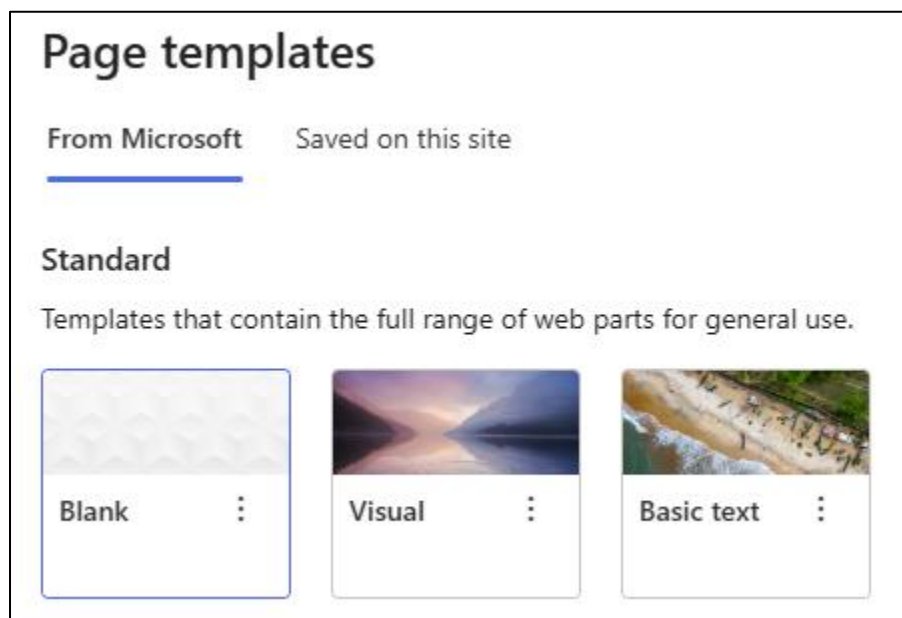
You can create pages to organize the data on your site. The pages can contain web parts that hold diverse types of information. The pages can be published to your site.

Creating a New Page

1. Click the New icon.



2. Select Page.
3. Choose the template you want to use to create the page and then click Create page.



4. Add a title and content to the page.
5. Click Save as draft if you are not ready to publish the page or click Publish to save and publish the page.

Viewing a List of Pages

1. Select Settings>Site contents.



2. Select Site Pages.

Contents		Subsites
	Name	Type
	Documents	Document library
	Form Templates	Document library
	Site Assets	Document library
	Style Library	Document library
	Training Files	Document library
	2024 Course Offerings	List
	Site Pages	Page library

A list of pages is displayed.

Site Pages	
▼	Name ▼
▼	Created By : James Storella (4)
	Course-Schedule.aspx
	CollabHome.aspx
	Training-Files.aspx
	Instructors.aspx
▼	Created By : System Account (1)
	Home.aspx

Editing a Page

Once you have created a page, you may want to update existing content or add new content.

1. Click the Edit link on the right side of the page. You'll now be able to make changes to the page.

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2. When you are done editing, click Save and close to keep the changes and Discard changes to revert back to the version you had before making changes.

Save as draft Undo Discard changes Page details Analytics

3. Click Republish to make the new content available.

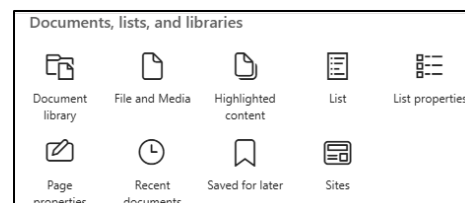
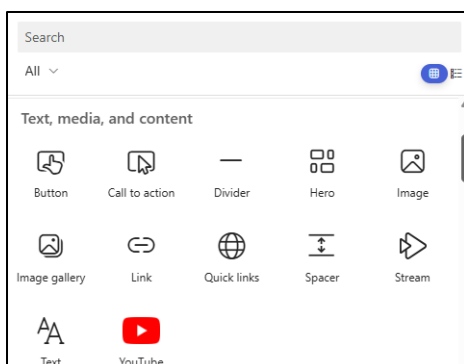
Adding Content to a Page

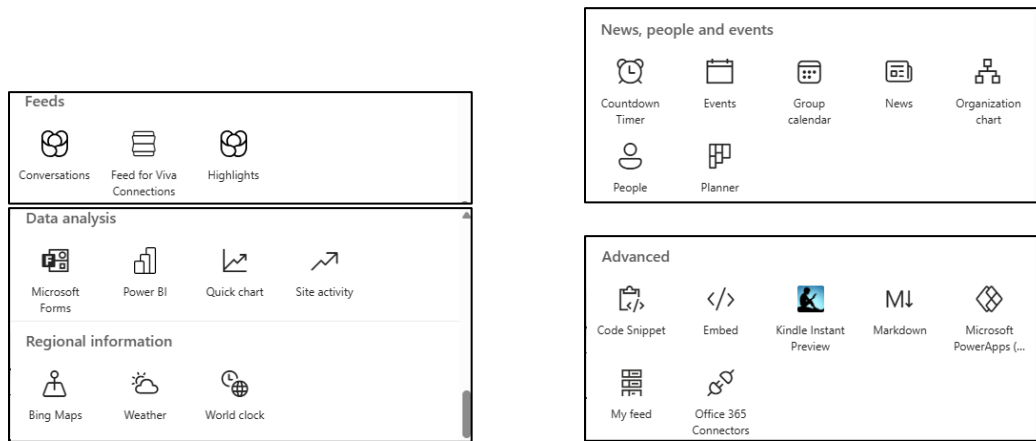
1. Place your cursor below the name of the page if there is no existing content on the page or place the cursor between items on the page in the location where you want to add new content. A line with a plus sign (+) appears.

Add a new web part in column one



2. Click the plus sign (+) to display a gallery of types of content you can add to the page.





3. Select the type of content you want to add to the page. A new web part appears that can display the type of content you selected.

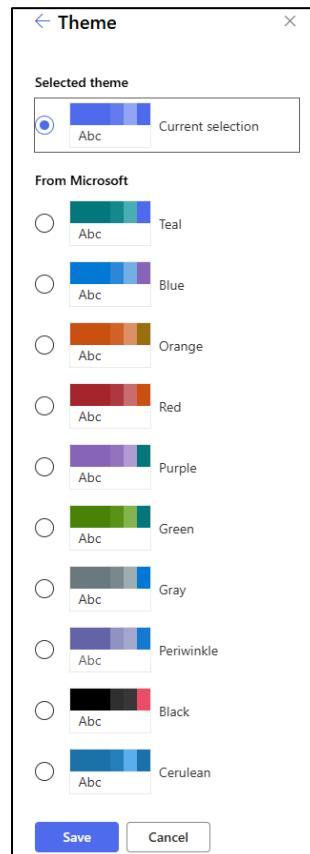
Applying a Theme to a Site

You can choose the overall look of a site by changing its theme.

1. Select Settings (the gear icon).



2. Select Change the look.
3. Select Theme.
4. Choose a theme from the gallery and click Save.



The fresh look is applied to the site.

Microsoft SharePoint Shortcut Keys

Frequently used shortcuts

To do this	Press
Navigate the screen.	Tab key
Display the context menu for the selected item.	Shift+F10 or Windows Menu key
Use search.	Alt+S
Copy text.	Ctrl+C
Cut text.	Ctrl+X
Paste text.	Ctrl+V
Undo the latest action.	Ctrl+Z

Author in a Text web part

To do this	Press
Select all text.	Ctrl+A
Insert a link.	Ctrl+K or two left brackets ([[])
Start an ordered list.	1+Period+Spacebar (Number one followed by a full stop and space)
Start a bulleted list.	Minus sign+Spacebar (Minus sign followed by a space)

Navigate a page

To do this	Press
Move between areas and sections.	Tab key
Exit the current operation or close a dialog box or pane.	Esc
Open the selected item.	Enter
Move between items.	Arrow keys

Undo or redo an action

To do this	Press
Undo the last action.	Ctrl+Z
Redo the last action.	Ctrl+Y

Edit text

To do this	Press
Copy text.	Ctrl+C
Cut text.	Ctrl+X
Paste text.	Ctrl+V
Undo the latest action.	Ctrl+Z
Apply or remove bold formatting.	Ctrl+B
Apply or remove italic formatting.	Ctrl+I
Apply or remove underline formatting.	Ctrl+U
Insert a hyperlink.	Ctrl+K
Delete a selection without adding it to the clipboard.	Delete
Delete the word to the left of the cursor.	Ctrl+Backspace
Delete the word to the right of the cursor.	Ctrl+Delete
Insert a new line (not inside the HTML Paragraph element <P>).	Shift+Enter

Work with lists and libraries

To do this	Press
Display the context menu for the selected item.	Shift+F10 or Windows Menu key
Open and close the Information/Details pane.	I