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Introduction

SharePoint is a web-based program tied into Office 365 that serves as a hub for sharing information, storing files and group collaboration. This reference guide will assist site contributors in navigating, following, adding site content and managing site documents.

Following a Site

The best way to view all of the sites that you are a member of is to follow them via the SharePoint tile located in the Office 365 portal. A site must be followed in order to be added to the SharePoint tile in Office 365.

1. In the address bar of your favorite browser, enter the SharePoint site you wish to follow. Note: Site URL’s look like this: http://tu.sharepoint.com/sites/SITENAME.
2. Login with your Towson email address and password.
3. In the top right hand corner of the site, click the FOLLOW button.
4. A pop-up box will appear indicating that you are now following this site.
5. Open a new browser tab and type office.towson.edu in the address bar.
6. Select SharePoint from the list of tiles that appear. Your SharePoint site will be listed under the heading Following.
Navigation

The SharePoint screen below is a standard template that is loaded for each site. **Note:** Each site can be customized according to needs. For the purpose of this reference guide, the standard Towson University template is featured.

![SharePoint screen](image)

**Figure 4**

| 1 | **Ribbon:** Click the **Page** tab to access the ribbon for the site. The ribbon contains additional commands and settings for the site. |
| 2 | **Help Icon:** Additional help on how to perform actions in **SharePoint** can be found here. |
| 3 | **Top Link Bar:** The top link bar is used to navigate to sub-sites and additional links. |
| 4 | **Title Link:** This is commonly a clickable image that will navigate you back to the home page from anywhere in your site. |
| 5 | **Search box:** The search box allows a user to enter a term and perform a search across the entire site. |
| 6 | **Quick Launch Bar:** This allows a user to navigate through the items on the site and explore additional site content. |
| 7 | **User Menu:** Allows a user to sign out or view their account information. |
| 8 | **Main Content Area:** This customizable area can display any lists, libraries or other content you have added to the site. |
| 9 | **Site Settings:** Accessing the site settings allows a user to add additional site content or customize their site. |
| 10 | **Document Library:** The Document Library houses all documents added to the site. From here, documents can be edited or shared with other users. |
Lists and Libraries

Lists and libraries are the foundation of a SharePoint site’s organization. Most everything in SharePoint is either a list or a library.

Lists house data in tables, much like an Excel spreadsheet. There are rows and columns. The information in your lists can be sorted, searched and filtered. Examples of lists in SharePoint are **Announcements**, **Contacts**, **Links**, **Calendar** and **Tasks**. Custom lists can also be created.

Libraries have a similar function as lists, however, libraries are repositories for site users to create, upload, collaborate and edit files. Think of it as a network share in the cloud that can be accessed anywhere with an internet connection without the need for a VPN. With 10 GB of storage and extensive permission controls, libraries can be created in SharePoint to store documents, forms, pictures and more.

Managing Site Content

Site content is the actual material that you add to the site and share with the group. Content is classified as either lists or libraries. Lists are used to store and organize communication and collaboration information. Libraries house files including documents, spreadsheets, presentations, pictures and forms.

The default lists in SharePoint are: **Announcements**, **Calendars** and **Tasks**.

Adding a New Announcement

**Announcements** in SharePoint give you the ability to disseminate news with your SharePoint site members.

1. From the **Quick Launch Bar**, select the **Announcements** link.

![Figure 5](image)

2. The **Announcements** screen will appear. Click the **+new announcement** link.

![Figure 6](image)
3. The **Announcement** form will appear. Add a **Title**, **Body** text, the date the message **Expires** (if necessary) and click **Save**.

![Figure 7](image)

**Adding a New Calendar Entry**

The Calendar in SharePoint provides site members the ability to keep track of important dates, meetings and events.

1. From the **Quick Launch Bar**, select the **Calendar** link.

![Figure 8](image)

2. Hover over a date that you wish to add an entry. Click the **+Add** link that will appear.

![Figure 9](image)
3. The **Calendar – New Item** entry screen will appear. Complete the entries and click **Save**.

![Calendar - New Item](image)

**Figure 10**

**Syncing a SharePoint Calendar with Outlook**

SharePoint calendars can be connected to Outlook. Adding or removing calendar entries via Outlook will sync to the SharePoint calendar.

1. From the **Quick Launch Bar**, select the **Calendar** link.
2. Click the **Calendar** tab in the ribbon.

![Office 365 SharePoint](image)

**Figure 11**
3. In the **Connect & Export** group, click the **Connect to Outlook** icon.

![Connect to Outlook](image1)

**Figure 12**

4. Your browser may display a pop-up message requesting permission to open Outlook. Click the **Open Outlook 2016** button.

![Open Outlook 2016](image2)

**Figure 13**

5. Outlook will display a pop-up message requesting your permission to connect to the SharePoint calendar. Click the **Yes** button.

![Connect SharePoint Calendar to Outlook](image3)

**Figure 14**

6. The calendar will open in Outlook and will be located under the **Other Calendars** heading.

![Other Calendars](image4)

**Figure 15**
Adding a Task

Tasks in SharePoint are items that can be assigned to specific members of the site. The members that are assigned tasks can update the progress. Tasks provide a great way to keep track of projects.

1. From the Quick Launch Bar, select the Tasks link.

![Figure 16](image)

2. The Tasks screen appears. Click +new task to add a new task to the task list.

![Figure 17](image)

3. Complete the task entry form and click Save to create the task.

![Figure 18](image)
Working with Files

The documents library is the central location from which users can update and manage files. SharePoint is integrated with the Office365 suite of programs. Documents can be created from within SharePoint, uploaded to SharePoint or saved from Office to SharePoint.

Creating a New File in SharePoint

1. From the Quick Launch Bar, click the Documents link.
2. In the Documents library, click the New button.
3. Choose the file type you wish to create from the drop-down menu.

4. The online version of the app will launch in Office 365.
5. Add content as you would normally.
6. Click the default file name in the title bar to change the name of the file.

7. Type a new file name in the field and press Enter. The file has now been renamed.

8. Closing the application, or selecting SharePoint from the App Launcher will bring you back to SharePoint.
9. The file will appear in the Documents library. You may have to refresh the page before it appears.
Uploading Files to SharePoint

Folders, documents and other Microsoft Office files that are on your computer can be uploaded and stored in SharePoint. There are two choices for uploading to your SharePoint site:

- **Files** – Upload a single file or multiple files via a file browser.
- **Folder** – Upload an entire folder from your computer to SharePoint via a folder browser.

**Uploading a File**

1. From the **Quick Launch Bar**, click the **Documents** link.
2. In the Documents library, click the **Upload** button.
3. Select **Files** from the drop-down menu.

![Figure 22](image)

4. The **Open** window will appear.
5. Select the file or files you wish to upload and click the **Open** button.

![Figure 23](image)

6. After uploading, the file will appear in the documents library. If you do not see it, refresh your browser page. **Note:** Dragging files to the documents library will upload them to SharePoint as well.
Uploading a Folder

1. From the Quick Launch Bar, click the Documents link.
2. In the documents library, click the Upload button.
3. Select Folder from the drop-down menu.

4. The Browse For Folder window will appear.

5. Navigate to and select the folder you wish to upload and click the OK button.

6. You will receive a notification in your Documents library when the files have finished uploading.

7. After uploading, the folder will appear in the documents library. If you do not see it, refresh your browser page. Note: Dragging folders to the documents library will upload them to SharePoint as well.
DeletiNG a File

Files can be deleted from SharePoint. Deleted files are moved to the Recycle Bin.

1. From the Quick Launch Bar, click the Documents link.

2. In the Documents library, place a check mark beside the file or files you wish to delete.

![Figure 27](image)

3. Click the Delete icon in the Documents library.

![Figure 28](image)

4. A confirmation window will appear. Click the Delete button.

![Figure 29](image)

5. A notification will appear when the files have been moved to the Recycle bin.

![Figure 30](image)
Using the Recycle Bin

By default, items are kept in the Recycle Bin for 93 days before they are automatically moved to the Second-Stage Recycle Bin. Once the files are in the Second-stage Recycle Bin, they are kept for an additional 93 days before they are permanently deleted. Site owners can access the Second-Stage Recycle Bin. All other site members only have access to the initial Recycle Bin. Note: There is no automatic backup of SharePoint sites so pay close attention to deleted files.

1. To view the Recycle Bin, click **Recycle Bin** from the **Quick Launch Bar**.

2. In the **Recycle Bin**, place a check mark beside the file or files you wish to manage.

3. To restore selected files, click **Restore Selection**.

4. To delete selected files permanently, click **Delete Selection**.
Sharing Files

1. From the Quick Launch Bar, click the Documents link.
2. In the Documents library, click the corresponding More button for the file you wish to share.

3. From the More menu, click Share.

4. The Share screen appears. Type the email address of the person(s) you wish to share the document with, select their permission level, include a personal message (if needed) and click Share.
Creating an Alert

An alert allows a user to track items in SharePoint. Once an alert is created, the user will receive an email notification whenever that item in SharePoint is updated or deleted. Alerts can be created for pages, lists, list items libraries, files and OneNote notebooks.

Note: Alerts cannot be sent via text message.

Creating Alerts for Pages

Creating an alert for a page enables you to receive a notification any time the page is edited. The default page in Towson University’s SharePoint environment is Home. To create an alert for the Home page:

1. Navigate to the Home page by clicking Home in the Quick Launch Bar.

Figure 37

2. Click the Page tab in the ribbon.

Figure 38

3. Click the Alert Me icon.

4. From the Alert Me drop-down menu, click Set an alert on this page.

Figure 39
5. The **New Alert** screen appears. Adjust the following to your preference:

- **Alert Title** – This is the name of the alert.
- **Send Alerts To** – In the **Users** field, type the site member’s TU email address.
- **Delivery Method** – This option cannot be changed.
- **Send Alerts for These Changes** – This section enables you to choose what type of changes will trigger an alert.
- **When to Send Alerts** – Here, you can choose how often you would like to receive alerts.

6. Click the **OK** button.

![Figure 40](image)
Creating Alerts for Lists

Creating an alert for a list will notify you of any changes to items within that list. The default lists in the Quick Launch Bar of SharePoint are Announcements, Calendar and Tasks. To create an alert for a list:

1. From the Quick Launch Bar, select one of the lists links.

![Quick Launch Bar Image]

Figure 41

2. In the ribbon, click on the List tab. Note: On the Calendar ribbon, click the Calendar tab.

![Office 365 and SharePoint Ribbon Image]

Figure 42

3. Click the Alert Me icon and choose Set alert on this list from the drop-down menu.

![Alert Me Icon Image]

Figure 43

4. The New Alert screen appears. Follow steps 5 and 6 on page 17 to set an alert.
Creating Alerts for List Items

List items are anything contained within a list of your SharePoint site. These items could be an announcement, calendar entry or task. **Note:** Creating an alert for a calendar entry is slightly different from the method for announcements and tasks.

Alerts for Announcements or Tasks

1. Navigate to a list (Announcements or Tasks) from the Quick Launch Bar and place a check mark beside the item you wish to create an alert.

2. From the ribbon, click the middle tab corresponding to the item. In Announcements, it is Items. In Tasks, it is Tasks.

3. From the Share & Track group, click Alert Me.

4. Click Set alert on this item.

5. The New Alert screen appears. Follow steps 5 and 6 on page 17 to set an alert.
Alerts for Calendar Entries

1. Click on Calendar in the Quick Launch Bar.
2. Navigate to the desired calendar entry and click on the entry’s title.

![Calendar Entry]

Figure 48

3. In the ribbon, click the View tab.
4. Click the Alert Me icon.

![Ribbon View]

Figure 49

5. The New Alert screen appears. Follow steps 5 and 6 on page 17 to set an alert.

Creating Alerts for Libraries

Creating an alert for a library will notify you of any additions or changes to items within that library. The default library in the Quick Launch Bar of SharePoint is Documents. To create an alert for the documents library:

1. From the Quick Launch Bar, click the Documents link.
2. Click on the More button in the Documents library, then click Alert me.

![Alert Me Button]

Figure 50

3. The New Alert screen appears. Follow steps 5 and 6 on page 17 to set an alert.
Creating Alerts for Library Items

Library items are anything contained within a library of your SharePoint site. The default library in SharePoint is Documents.

1. From the Quick Launch Bar, click the Documents link.
2. In the Documents library, click the corresponding More button for the file you wish to create an alert.

3. From the More menu, click Alert me.

4. The New Alert screen appears. Follow steps 5 and 6 on page 17 to set an alert.

Creating Alerts for SharePoint OneNote Notebooks

OneNote notebooks tied to your SharePoint site are a great way to collaborate with coworkers. These notebooks have various functions across all Microsoft Office applications to enhance your notes. To set an alert on your SharePoint OneNote notebook:

1. Click Site Contents in the Quick Launch Bar.
2. Scroll down to the Contents section on the following screen and click on the Site Assets folder.
3. Click the corresponding More button for the OneNote notebook you wish to create an alert.

![Site Assets](image)

**Figure 54**

4. From the More menu, click Alert me.

![More menu](image)

**Figure 55**

5. The New Alert screen appears. Follow steps 5 and 6 on page 17 to set an alert.

6. Click the OK button.