SharePoint: Power Users

This class will explore tools and sections of SharePoint that allow you to modify the content of a SharePoint site. To access SharePoint, you will need to log into Office 365.

Accessing and Logging In

Office 365 is available on any device with an internet connection. Office 365 works with desktop computers, laptops, tablets, and mobile devices. To access and log into Office 365 go to:

uwm.edu/office365

Once at the login screen, type in your UWM email address and password.

Confirm your identity via your desired Duo security method (Push / Code entry).

Office 365: SharePoint

SharePoint is the app within Office 365 that creates websites used as secure places to store, organize, share and access information. In the list of apps, click SharePoint to open the app.
# SharePoint Working Screen

## Section Description

<table>
<thead>
<tr>
<th>Section</th>
<th>Description</th>
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</thead>
<tbody>
<tr>
<td>1</td>
<td><strong>App Launcher</strong>&lt;br&gt;Allows you to move between the different apps in Office 365 such as Outlook and OneDrive.</td>
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<tr>
<td>2</td>
<td><strong>Site Options</strong>&lt;br&gt;Contains buttons for following and sharing the site with others.</td>
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<tr>
<td>3</td>
<td><strong>Search Bar</strong>&lt;br&gt;Used to search for items on the SharePoint site.</td>
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<tr>
<td>4</td>
<td><strong>Navigation</strong>&lt;br&gt;Lists features of the site and provides a quick way to navigate and access the content on the site. Can be on the left of the page or on the top of the page.</td>
</tr>
<tr>
<td>5</td>
<td><strong>Page Content</strong>&lt;br&gt;Shows contents of the SharePoint site including elements like the document library and News.</td>
</tr>
</tbody>
</table>

**NOTE:** Office 365 is a cloud service updated and maintained by Microsoft. As a cloud service, Microsoft can update and change features in Office 365 as needed. UWM has little to no control over these changes and parts of this document may be incorrect after printing/publishing because of these updates.
**View Site Contents**

If you are not sure what elements are contained in the SharePoint site you are using, you can view the site contents.

1. In the left navigation, click the link for *Site Contents*. This opens a window containing all the contents of the site.

   -OR-

1. If the site contents link is not in the list, in the upper right corner of your screen click the *Settings* button (Gear icon).

2. From the menu, choose *Site Contents*.

**Document Library Management**

Document libraries are the most-used feature of a SharePoint site. To organize your site, you can create additional document libraries, add new columns into libraries and create a Flow to help with document management.

**Create a New Library**

To help organize the files in your SharePoint site, you can create additional document libraries.

1. In the upper right corner of the screen, click the *Settings* (Gear) icon. From the menu, choose *Site contents*.
2. At the top of the screen under the name of the site, click the **New** button; from the menu choose **Document library**.

![New button and document library menu](image)

3. In the pane on the right, enter a **Name** and **Description** and choose if you want to see the library in the site navigation. Click **Create**.

![Create document library dialog](image)

**Create a Column**

To assist the users of the site in managing and finding documents in a library, you can create additional columns of metadata in the library. Users can then sort and filter using these new columns of information.

1. Navigate to the library where you want to add columns.
2. In the library, click on **+ Add column** at the end of the column listing.

![Add column button](image)

3. In the menu that appears, choose the type of column you want to create. A pane appears on the right with column creation options.

![Create a column dialog](image)

4. Fill in the fields to create the column, note that the **Name** field is required. When finished, click the **Save** button at the bottom of the pane.
**Use a Column**

Once the column is created, users of the library can use the column to assist in organizing and locating files in the library.

1. Navigate to the document library with the new column(s) and notice the new column(s) in the library.
2. To change the value of any of the added columns, click the ... (*ellipses*) button to the right of the file name.

3. From the menu, choose **More** and from the submenu choose **Properties**. A pane will open on the right side of the screen.
4. Edit the properties as needed; to save the properties, click outside of the column name.
5. When finished, click outside of the Properties pane to close it.

**Create a Flow**

Using the Microsoft Flow app, you can create an automated series of actions for collaboration, approval and release of items in a library. Flows are be pre-programmed flowcharts that automatically direct items from one user to another to gain approval, signatures, feedback or customized processes.

1. Navigate to the document library where you want to create the flow.
2. On the top toolbar, click the **Flow** button and then choose **Create a flow**.

3. In the pane that appears on the right side of the screen, choose the type of flow. This will open the Microsoft Flow app.
4. The first screen confirms how the connections will be made between SharePoint and other apps. This could include Mail, Notifications and even third-party apps. Unless you are including a third-party app, you should not need to change anything on this screen. Click the **Create Flow** button at the bottom of the screen to create the flow.
5. To change the details of your flow, click the **Edit** button on the top toolbar.

![Edit button](image)

6. The next screen shows the flowchart for your flow. To see a full list of settings for each step in the flowchart, click within the box; it will expand and allow you to make changes to the step.

![Flowchart](image)

7. Change the settings as needed for each step of the flow.

8. If there are steps you do not want in the flow, click the **ellipsis** button for the step (…) and choose **Delete**.

9. To add in additional steps in the flow, hover over the arrow between two steps, a **plus sign** (+) will appear, click it and choose **Add an action** or **Add a parallel branch**.

10. When finished, click **Save** at the bottom of the screen.

**Edit a Flow**

If a flow that you created needs modifications, you can edit the flow so it operates correctly.

1. Navigate to the library in the SharePoint site that has the flow you want to edit.

2. On the top toolbar, click the **Flow** button.

3. In the menu that appears, choose **See your flows**.

![Flow menu](image)

4. Microsoft Flow opens, and a list of the flows you created appears on the screen. Click the name of the flow you want to edit.

![Flow list](image)

5. The flow details screen appears, to edit the flow, click the **Edit** button on the top toolbar.

6. Edit the flow as needed and click the **Save** button at the bottom of the screen.
Delete or Turn Off a Flow

If you no longer need a flow to run on a library, you can remove it or turn it off.

1. Navigate to the library in the SharePoint site that has the flow you want to remove.
2. On the top toolbar, click the Flow button.
3. In the menu that appears, choose See your flows.
4. In the list of flows, locate the flow to turn off or delete.
5. Click the ellipsis (…) button to the right of the file name. In the menu, choose to either Turn off or Delete the flow. If you are deleting the flow, you will need to click the Delete button in the window that appears to confirm the deletion.
6. If you want to restart a flow that was turned off, repeat steps 1-4. Click the ellipsis (…) button to the right of the file name and choose Turn on.

Delete a Library

If you no longer need a document library, you can delete the library from your SharePoint site. This will also delete all the files contained in the library.

1. In the upper right corner of the screen, click the Settings (Gear) icon. From the menu, choose Site contents.
2. In the list of site contents, locate the library you want to delete. Click the ellipsis (…) button to the right of the library name.
3. From the menu, choose **Remove**.

4. In the window that appears, click **Delete** to confirm the deletion.

**Create a List**

SharePoint lists allow you to store a table of data directly in SharePoint instead of within an Excel or Word file. A list allows multiple users to add, edit and delete from the list, and the ability to add alerts.

Lists can contain many items and there may be times when you cannot see all the items in the list on one screen or you want to see a relevant item or items. Searching, sorting and filtering makes it easy to locate a list item; by clicking on column headings you can access these options.

1. In the upper right corner of the screen, click the **Settings (Gear)** icon. From the menu, choose **Site contents**.

2. At the top of the screen under the name of the site, click the **New** button; from the menu choose **List**.
3. The new list will have 2 columns, **Title** and **Add column**. Begin by clicking the down-arrow next to **Title** and choosing **Column settings** then **Rename**.

![Image of Column settings and Rename]

4. Rename the column and then click **Save**.

5. To create new columns in the list, click **Add column** and choose the type of data the column will hold.

![Image of Add column and column types]

6. This will open a pane on the right side of the screen. Enter the **Name** of the column and make any other relevant modifications to the pane. Click **Save** when finished.

7. Repeat this process until you have all the desired columns in your list.

**Editing a List**

If you need to make changes to a column or reorganize the columns in the list, you can use the **Column settings**.

1. Click the down-arrow next to the column heading you want to modify.

2. From the menu, choose **Column settings**.
3. From the column settings, you can:
   - **Edit** the column name and settings
   - **Move** the column right or left
   - **Hide** the column

![Column settings menu]

4. To delete a column and its data, under **Column settings** choose **Edit**. In the pane on the right, choose **Delete** in the lower right corner.

**Delete a List**

If you no longer need a list, you can delete the list from your SharePoint site. This will delete both the list structure and the data in the list.

1. In the upper right corner of the screen, click the **Settings (Gear)** icon. From the menu, choose **Site contents**.

![Settings menu]

2. In the list of site contents, locate the list you want to delete. Click the **ellipsis (…)** button to the right of the list name.

3. From the menu, choose **Remove**.

![List menu]

4. In the window that appears, click **Delete** to confirm the deletion.
**Create & Publish a Page**

Sometimes you want information on a single page of a SharePoint site and not in a document library, list or within the contents of a file. To do this, you can add a page to your SharePoint site and have a custom arrangement of links, pictures, embedded video, forms, web parts and text.

**Create a New Page**

When you create a new page, by default it is a draft and not published to the site; when you are ready, you can publish the page and add it to your site navigation.

1. In the upper right corner of the screen, click the **Settings (Gear)** icon. From the menu, choose **Site contents**.

2. At the top of the screen under the name of the site, click the **New** button; from the menu choose **Page**.

3. Enter a **Name** for the page by clicking the **Name your page** text and type a new name for the page.

4. To add content to the page, click the **+ (plus)** sign below the page name. Choose the type of content to add and enter the content.
5. To edit or delete the content, click the pencil or trash can icons to the left of the content.

6. To add more content, click the + (plus) sign below the existing content.

7. When you are finished editing the page, click the Save as draft button in the upper left corner. This will save the draft of the page, but not publish the page.

8. To publish the page, click the Publish button in the upper right corner of the page.

9. A pane will appear, and you can choose to Add page to navigation, Post as News on this site, Email or Save as page template. You can also copy the address of the page to publish in other places.

**Edit a Page**

Once a page is created, you can go back and edit the content.

1. Navigate back to the page you created.
2. In the upper right corner of the page, click the Edit button.
3. When you are finished editing the page, click the Republish button in the upper right corner of the page.

**Delete a Page**

If you no longer need a page, you can delete the page.

1. In the upper right corner of the screen, click the Settings (Gear) icon. From the menu, choose Site contents.
2. In the site contents, click Site Pages at the bottom of the list.
3. In the screen that appears, locate the page you want to delete. Hover over the name of the file and then click the ellipsis button (…) to the right of the link and choose Delete.
Configure Navigation

The navigation on the left side of the page shows all the links in your site such as Documents, Notebook and so on. Using the steps below, you can modify the navigation to include new items as well as configure the existing items.

Rename, Remove or Reorder Navigation

1. To begin configuring the navigation, click **Edit** at the end of the navigation list.

2. To rename a link, click the name of the link and type a new name in the box. Click **OK** when finished.

3. To remove a link, click the **ellipsis** button (…) to the right of the link and choose **Remove**.

4. To reorder links, click the **ellipsis** button (…) to the right of the link and choose **Move up**, **Move down** or **Make sub link**.

Add a New Link

1. To add a new link, hover your cursor in the space between two existing links and when the plus sign in a circle appears, click it.

2. In the window that appears, type or paste in the **Address** of the link and type in the **Display name**. When finished click **OK**.
Share a SharePoint Site

Now that your SharePoint site is set up, you can give others permission to access the site.

1. On the Home page of the site, locate and click the Share button in the upper right corner.

2. In the window that appears, enter the name or email address of the person that you are sharing the site to and a personal message if desired.

3. Click on SHOW OPTIONS. Make sure that the box is checked for Send an email invitation.

4. When finished, click the Share button. The person you shared to will receive an email message letting them know that the site has been shared to them.

Sign Out

When you are finished with Office 365, you should sign out before closing the browser window.

1. Click the person icon or your photo in the top, right corner of the screen.

2. In the menu, choose Sign out.

3. You are now signed out of Office 365; close the browser to complete the process.

Getting Help

For a full listing of all Short Courses offered and training manual downloads, visit: uwm.edu/learningtechniques.

For 24/7 access to online technical training videos, visit uwm.edu/linkedinlearning.

For technical assistance after this course is over, contact the UWM Help Desk:

- By phone: (414) 229-4040 or toll-free (877) 381-3459
- Website: uwm.edu/helpdesk
- Walk-In: Bolton 225A & Library Learning Commons (Monday-Friday, 8 am-5 pm)