Introduction to SharePoint Online for City Employees

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City of Seattle Department of Information Technology
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Welcome to SharePoint Online 2013

SharePoint Online (SPO) is a collaboration tool that gives users the ability to share documents and other information and to easily communicate with each other. SPO allows you and your team the ability to share files, edit documents and communicate across the team online and in real time. This is especially useful if team members are in different units and departments – or are external consultants.

The purpose of this document is to acquaint you with some basic SharePoint features that will help you use SharePoint Online to store, share and access information, documents and materials.

With SharePoint Online users:

- Have one place for documents, a notebook, calendar and a site newsfeed
- Can follow a person, a document, a project
- Can share, edit or create new documents
- Can access your team site from any City-approved device

With SharePoint Online, files are organized, stored securely in the cloud and accessed by almost any City owned device such as desktops, laptops and mobile devices as long as an Internet connection is available. Of course, with this level of access, follow best use practices to protect City information.

This document focusses on SharePoint Team Sites and provides basic information on Office Online.

NEW TO SHAREPOINT ONLINE?

Your SPO Points of Contact

- For program management requests, troubleshooting, and high-level information – see Appendix A
- For coordination, training and materials requests, questions and information – see Appendix B
- For SPO support, contact your Department Site Collection Administrator – see Appendix C

ACCESS AND NAVIGATE SHAREPOINT ONLINE

There are TWO ways to access SharePoint Online Sites:

1. Login to your department’s SharePoint Online from your Browser
2. Receive an email from a Site Collection Administrator (SCA) granting permission to a Team Site

Login from Your Browser

NOTE: If you are logging in from OUTSIDE of the City network, you will be prompted to login to validate that you have an active City account.

1. **The Office 365 User Access Portal/Landing Page opens - Portal to all Office 365 apps.** (Please Note: Images on the Landing Page routinely change)

2. **Components of the 365 User Access Portal:**
   - **APP LAUNCHER:** Click to navigate between Applications
   - **SETTINGS:** Change Themes, etc.
   - **HELP BUTTON:** Click to search for answers to questions
   - **COLLABORATE** Click to access Sites and Apps
   - Two ways to navigate between sites and apps
   - Click here for details or if printed, go to end of document
Invitation to Your Team Site by Site Leader Permission

The majority of City employees will begin to use SharePoint Online (SPO) as a Team Site, similar to how they collaborate with their team on a shared network drive. Therefore, this document will focus on how to access and start using a Team Site.

A Site User must be invited by email to join a site by the Site Collection Administrator, who directly oversees the site.

Types of Permissions

Permissions are rights that a Site Collection Admin grants to individuals or groups to access a Team Site. Permissions vary by the type of actions you are allowed to perform on the site required by your job.

Below is a brief and small sampling of common Permission Levels

Site User:
- **Read**: Users can view pages and download documents
- **Contribute**: Users can edit items, like documents, PowerPoints, and Excel spreadsheets and add lists
- **Edit**: Users manage lists

Site Leader:
- **Approve**: Leader can edit and approve pages, lists, and documents
- **Design**: Leader can view, update, delete, approve, and customize site pages

Site Collection Administrator (SCA):
- **Design**: SCAs can create and edit sites, apply themes and borders
- **Manage Access**: SCAs can control and change site permissions – have full control of site

Email from a Site Collection Admin Granting Site Permission

When an SCA creates a site for your team, they will send you an email granting you permission to the site. Click link next to Go to to enter the site and click Follow to receive site updates on your Newsfeed.
The Team Site Page

After your Site Collection Admin has granted you permission to the Site, login and click SITES, select your Team Site Home Page. NOTE: There is no one “look” for a Team Site Page. Team Sites will vary by requirements, so the SCA will design the look and components of your Team Site based on the team’s scope of work.

1. **App Launcher**: Access links to Sites & Apps.
2. **Office365**: Takes you to the Landing Page.
3. **Sites**: Links to sites that you follow or create. It also provides links to suggested sites based on a compilation of search results.
4. **Settings**: Change Themes, Colors, etc.
5. **Help**: Click to search for answers to questions.
6. **About Me**: Your Profile
7. **Browse**: Displays site
8. **Page**: Toolbar for additional settings
9. **Share**: Share site with others
10. **Follow**: Follow people or items.
11. **Edit**: Ability to edit site (by permission of the Site Leader or SCA).
12. **Focus on Content**: Hides Quick Launch and Graphics.
13. **Search**: Ability to search for people, documents, videos, sites etc.
14. **Quick Launch**: Links to navigate between the current features on the site.
   a. **Notebook**: OneNote to take and organize notes
   b. **Documents**: Link to files and folders
   c. **Recent**: Recent items added to site
   d. **Site Content**: Apps – available to Site Leader or SCA.
   e. **Recycle Bin**: Deleted items
15. **Calendar**: Can be configured by timeline or grid
16. **Documents**: Central location to store and access files & folders.
17. **Newsfeed**: Posts of conversations and activities. Only team members can view the posts in a Team Site newsfeed.
18. **Project Tasks**: List to capture action items and deadlines.
DOCUMENTS

One way to get started using SharePoint Online (SPO) is to UPLOAD documents from your network drive(s) onto Document Libraries. Documents are stored in Document Libraries. The TEAM SITE LIBRARY is the central location for folders, files and other content created by your team.

Browse to Upload a Document from Network Drives or Desktop

1. Click Documents from the Quick Launch links on the left.

2. The Documents Library opens. If added, click the Destination Folder. This saves you a step. Click Upload. If not, go to next step

3. Click Browse and select a file.
   a. If you opened the Destination Folder, the Folder Name will be visible in the Destination Folder field. Click OK.
   b. If you didn’t start by opening the Destination Folder, click Choose Folder to designate a Destination Folder. Click OK at Choose Folder and OK at Add a Document.

4. The File is successfully uploaded.
Drag and Drop to Upload from Network Drives

Dragging and dropping files is a quick and easy way to upload documents from your network drives to SharePoint Online.

1. Open the Folder in the Document Library where the files will be dropped. Notice “Drag files here to upload”

2. On top of the SharePoint Online Document Library, open the Folder in the network drive that contains the files to be uploaded and select the files.

   To Select Consecutive Files, (grouped together) click the first file, press and hold the Shift Key and click the last file. All the files in-between will be selected.

   To Select Non-Consecutive Files, (not grouped together) press and hold the Control Key and click each file you want to select.

3. Drag Files to SharePoint Online and be sure to drag until the “Drop here” message appears.

4. Files are successfully Uploaded to your SharePoint Online Document Library Folder.
Share a Document

1. Click to the left of the document icon to activate action links. **Click Share.**

   ![Image of document sharing](image)

2. **Click Invite People,** start entering a name (SharePoint Online will find the name), **give Edit or View rights,** and click Save.

   ![Image of invite people](image)

3. **To view who has permissions,** click the **Ellipses** next to the document name.

   ![Image of document permissions](image)

View a Document

There are two ways you can **View and Edit a Document.** You can **View a Document in Word Online or in “full” Word 2013** installed on your computer.

What is the difference between Word Online and “full” Word?
• **WORD ONLINE** is a “lightweight” version of Word that gives you the ability to create documents and edit documents with very basic editing features. For example, you can format, create tables, insert pictures, header or footers, and adjust margins and spacing. Because this is an Online version of Word used within a browser, you don’t need to have Word installed on your computer.

Some great perks to WORD ONLINE are:

❖ **Co-Authoring:** You and your team can work on a document together in real time, view each other’s edits and make comments as you go along.

❖ **Saves Automatically:** Office Online applications save automatically. When finished, click the Back Arrow to return to the Homepage.

• **FULL WORD** is the version of Microsoft Word 2013 installed on your computer.

**View in Word Online:**

1. Click the document name.

   ![Draft Glossary](image)

   ... A few seconds ago  Anton, Joanne

2. Document opens in Word Online.

3. From here you can View or Edit in “full” Word or in Word Online.

**View in Word**

For a deeper dive into more advanced functions such as Table of Contents, you need to open “full” Word.

1. Click Edit Document and then click Edit in Word.

2. If a Security window opens – click Allow.

**NOTE:** Depending on your configuration, you may or may not see this Window.

3. The document opens in “full” Word on your computer.
Edit a Document and Download a Copy or PDF

1. Follow the same steps as View in Word Online or View in Word.

2. **HOT TIP!** If you Edit in Word Online, you don’t need to Save. Click File > Save As to see that SharePoint Online is saving the document automatically.

   ![Save As Dialogue Box](image)

3. **HOT TIP!** You can Download a Copy or as PDF from here.

Syncing Content to Your Work Computer or Laptop

Sync to your Work PC or Laptop:

**SYNC ONLY TO CITY DRIVES**

**DOCUMENT LIBRARIES** are synced from your SharePoint Online Team Site. You can’t sync an individual folder or file from SharePoint Online.

Syncing Libraries from SharePoint Online

1. Click Sync in your Document Library.

2. Click Sync Now.

3. Click Sync Now one more time.
4. Files begin to Sync. They are being Synced to your C:\ Drive and a SharePoint shortcut is added to your Favorites.

You can actually watch them Sync.

5. SharePoint is added to your Windows Explorer and the green check mark confirms the files synced successfully.

Windows Explorer Icon in Taskbar:

If you have problems or questions regarding Sync, call 4-HELP.

6. To Save in AN ADDITIONAL SITE in Favorites, go through the Sync steps and open the Folder – in this case, it's testteam – Documents

7. Scroll up to Favorites and right-click Add Current Location to Favorites

8. The Document Library is Added to Favorites

The advantage of Syncing is you can access documents from SharePoint in FAVORITES without logging into SharePoint Online.

Remember, you MUST be connected to the Internet to Sync.

AND, if you’re working Offline, like in an Airport without Internet access, your document(s) will Sync as soon as you login to the system upon your return.
Versioning

Versioning tracks and manages information in a document as it is changed and edited. This is especially useful if multiple people are working on the same document. Versioning allows you to view, recover earlier versions and identify the dates and see who changed the text in the document.

1. To view a document’s version history select the Document.
2. Click the Ellipsis next to the Modified column.
3. Click Version History in the More Actions list.

<table>
<thead>
<tr>
<th>No.</th>
<th>Modified</th>
<th>Modified By</th>
<th>Size</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>0.3</td>
<td>9/11/2014 10:40 AM</td>
<td>Anton, Joanne</td>
<td>768 KB</td>
<td></td>
</tr>
<tr>
<td>0.2</td>
<td>9/11/2014 10:38 AM</td>
<td>Anton, Joanne</td>
<td>771.7 KB</td>
<td></td>
</tr>
<tr>
<td>0.1</td>
<td>9/11/2014 9:55 AM</td>
<td>Anton, Joanne</td>
<td>774.3 KB</td>
<td></td>
</tr>
</tbody>
</table>

5. Version Types:
   a. **Major Versions**: Numbered versions where a new version number is assigned each time the document is opened. Major Versions end in .0, as in 1.0.
   b. **Minor Versions**: Draft Versions that end with a number, as in 1.1. Views are restricted - users must have permissions granted by the Site Leader to read Minor Versions. A document can be changed to a Major Version when it is ready to be reviewed by a wider audience.

More Actions: Properties, Downloading, Deleting

A list of additional commands and actions relating to your document.

- **Click both Ellipses.** The More Actions gives you these options:

- Notice all the things you can do from the More Actions Ellipsis. Common actions:
  a. Download something from SharePoint Online to your computer
  b. Share something with someone
  c. View or Edit Properties
  d. Delete a document
Search

Search is the ability to find things. The Search field is near the top right of the screen. Click the Down Arrow to view all Search categories. The examples below are partial results for searching ARTS in each category:

1. **Search Everything:**

   ![Search Everything](image)

2. **Search People:**

   ![Search People](image)

3. **Search Conversations:**

   In this case, no match found in Conversations.

![Search Conversations](image)

4. **Search Videos:**

   In this case, no match found in Videos.

![Search Videos](image)
NEWSFEED

Newsfeed is a one-stop shop where you or others can start conversations, post documents, videos, and or links.

There are two types of Newsfeed:

- **Team Site Newsfeed**: Content posted by team members related to work teams or projects, or updates when someone edits a document, updates on activities or posts about relevant articles or links.
- **“Citywide” Newsfeed**: “Share with Everyone” conversations visible to ALL employees in the City of Seattle. You can see conversations started by people even if you’re not following them. **This should be used with caution so information confidential to departments or projects are not broadcast across the City.**

**Post to a Team Site Newsfeed**

1. **To Post to your Team Site Newsfeed**, click in the Start a Conversation field.

2. Enter the text and click Post.

3. Your message posts to the Team Site Newsfeed. Only team members with access to this site can read your post.

**Post to the “Citywide” Newsfeed — Share with Everyone**

1. Click the Menu Button Newsfeed on the blue Header Bar and select Newsfeed.

2. Enter your text, share with everyone and Click Post.

IMPORTANT! Change Your Newsfeed Settings

Why change your Newsfeed Settings? TO PREVENT UNWANTED EMAILS FROM FLOODING YOUR INBOX.

Select activities that you want to be notified about in an email and which of your activities you want to share. You can also control whether people will be able see who you follow and who is following you.

1. **Click the Down Arrow** next to your **Name** on the top right in the blue header and **select About Me**.

2. **Click Edit Your Profile**.

3. **Click the Ellipsis** next to Details and select Newsfeed Settings.

4. By default, all the settings will be selected. **UNCHECK** the setting in Email Notifications, People I Follow and Activities I want to Share in my Newsfeed that you do not want activated and check ONLY the email notifications you want to receive. The fewer Activities you share – the fewer emails youʼll get in reply.

5. **Click Save All and Close**.

6. **This Notice will appear** – click **OK**.
FOLLOWING

You can Follow documents and people. Following People allows you to track posted conversations in Newsfeed. Following a Document allows you to track updates and bookmark the document so you can find quick and easily – if you Follow a Document, you don’t have to search for it.

1. To see the list of people you’re following click the number below I’M FOLLOWING.

2. The site displays people you are following and suggests others to follow. To Follow more people, click Follow Multiple People.

3. Enter names of people you want to follow – last name first – and click Follow.

4. They’re added to the list.
5. To Follow a Document, click the Ellipsis next to the document name and click Follow at the Bottom of the View Window.

6. Click OneDrive.

7. Click Followed.

8. The Document appears in Docs I’m Following.

ADDITIONAL FEATURES - CALENDAR

This section covers the basic functions of your site Calendar. Use the Team Site Calendar to schedule team events and activities.

View a Calendar

1. Click Calendar on the Quick Launch column to access the Calendar.

2. A full view of the current month Calendar will display.
Add a Calendar Item

1. **Click on or hover over** the date and click the **+Add** link.

2. **Fill in the Calendar – New Item window.** **Click Save.**

![Calendar - New Item](image)

Edit Calendar Item

1. **Click the Calendar Item** to open and click **Edit Item** from the **View Tab.**

2. **Make the needed changes and click Save.**

![Edit Calendar Item](image)
Delete a Calendar Item

1. Click the Calendar to open and click Delete Item.

2. Click OK on Message Window.

Sync to Outlook Calendar

1. Click the Calendar Tab near the top left.

2. Click Connect to Outlook

3. If syncing with Outlook for the first time, this window opens.

4. Click Allow in the Security Window.
5. SPO Calendar opens in Outlook.

6. To Combine both Calendars, click the Arrow on the SPO Calendar.

7. To Separate the Combined Calendars, click the right-facing Arrow in the SPO Calendar.
ADDITIONAL FEATURES - TASKS

1. To add a Task, click either Project Tasks from the Quick Launch in left column or Project Tasks on the Homepage.

2. You can add a New Task or Edit the List. We’ll add a New Task.

3. Enter the Task name, start and due dates, and person assigned – enter last name to search. Click Save.
4. Task appears in Task List.

5. To Display Task on Project Summary, click the Ellipse to the right of the Task.

6. Click Add to Timeline.

7. Task appears on Timeline.

8. Click Check Box when Task is complete.
BONUS: SETTINGS & PROFILE INFORMATION

Settings
Click the Gear at the right of the blue Header to open the Settings Menu.

Office 365 Settings
1. **Me**: Your contact information and list of Assigned Licenses

2. **Software**: Identifies computer name, operating system, installation date, and lists the latest version of Office. **NOTE**: Most City employees cannot install software on their computers. Contact 4-HELP for more information.

3. **Theme**: Change the look and color of your Header Bar.

4. **Start Page**: Choose where you land when logging into Office 365.

5. **Password**: Disregard this option. Click on it and this message displays:

   You can’t change your password here.

   Your organization doesn’t allow you to change your password on this site. Please change your password according to the method recommended by your organization, or ask your admin if you need help.

   Cancel

Profile Information
This is located to the right of the Blue Header and is where Users can configure and edit their Profile information. To access, click the down arrow next to your name.

1. **About Me**: Contains personal information like phone number, email address, your skills, interests and activities and provides a link to edit your Profile.

2. **Sign Out**: Returns User to the Sign In Page.

3. **My Settings**: User information from your Profile.
Appendix A – Points of Contact

SPO Information

The table below provides a list of the points of organizational contact (POCs) that may be needed for informational and troubleshooting purposes.

<table>
<thead>
<tr>
<th>Contact Name</th>
<th>Title</th>
<th>Phone Number</th>
<th>E-Mail</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shannon Smith</td>
<td>O365 Program Manager</td>
<td>684-0700</td>
<td><a href="mailto:Shannon.Smith@seattle.gov">Shannon.Smith@seattle.gov</a></td>
</tr>
<tr>
<td>Barbara Hjelmstad</td>
<td>Information Technology Service Management</td>
<td>684-3644</td>
<td><a href="mailto:Barbara.Hjelmstad@seattle.gov">Barbara.Hjelmstad@seattle.gov</a></td>
</tr>
<tr>
<td>Angel Ramirez</td>
<td>Enterprise SharePoint Admin</td>
<td>733-9442</td>
<td><a href="mailto:Angel.Ramirez@seattle.gov">Angel.Ramirez@seattle.gov</a></td>
</tr>
</tbody>
</table>

Appendix B – Project Team Coordinators

Coordination

The SPO Project is coordinated through an Integrated Project Team (IPT) comprised of program office personnel, policy control personnel, and multiple functional staffs within the Department of Information Technology. These groups interact and coordinate the transition to SharePoint Online for the City Departments and Users.

<table>
<thead>
<tr>
<th>Role/Function</th>
<th>Name</th>
<th>Department</th>
<th>Phone Number</th>
<th>E-Mail</th>
</tr>
</thead>
<tbody>
<tr>
<td>SPO Project Manager</td>
<td>Bonnie West</td>
<td>DoIT</td>
<td>733-9676</td>
<td><a href="mailto:Bonnie.West@seattle.gov">Bonnie.West@seattle.gov</a></td>
</tr>
<tr>
<td>Training Coordinator</td>
<td>Joanne Anton</td>
<td>DoIT</td>
<td>684-7931</td>
<td><a href="mailto:Joanne.Anton@seattle.gov">Joanne.Anton@seattle.gov</a></td>
</tr>
<tr>
<td>Organization Change Management</td>
<td>Chris Remington</td>
<td>Consultant</td>
<td>727-8710</td>
<td><a href="mailto:Chris.Remington@seattle.gov">Chris.Remington@seattle.gov</a></td>
</tr>
<tr>
<td>SharePoint Site Collection Admin</td>
<td>Nate Eckstine</td>
<td>DoIT</td>
<td>233-9658</td>
<td><a href="mailto:Nate.Eckstine@seattle.gov">Nate.Eckstine@seattle.gov</a></td>
</tr>
<tr>
<td>Business Analyst</td>
<td>Kristina Pham</td>
<td>DoIT</td>
<td>684-5790</td>
<td><a href="mailto:Kristina.Pham@seattle.gov">Kristina.Pham@seattle.gov</a></td>
</tr>
</tbody>
</table>

Appendix C – SPO Support

SPO Support

<table>
<thead>
<tr>
<th>Role/Function</th>
<th>Name</th>
<th>Department</th>
<th>Phone Number</th>
<th>E-Mail</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enterprise SharePoint Admin</td>
<td>Angel Ramirez</td>
<td>Department of Information Technology</td>
<td>733-9442</td>
<td><a href="mailto:Angel.Ramirez@seattle.gov">Angel.Ramirez@seattle.gov</a></td>
</tr>
<tr>
<td>DON Site Collection Admin</td>
<td>Ann Robinson</td>
<td>Department of Neighborhood</td>
<td>684-0359</td>
<td><a href="mailto:Ann.Robinson@seattle.gov">Ann.Robinson@seattle.gov</a></td>
</tr>
<tr>
<td>DOT Site Collection Admin</td>
<td>Sandra Obuck</td>
<td>Department of Transportation</td>
<td>233-7826</td>
<td><a href="mailto:Sandra.Obuck@seattle.gov">Sandra.Obuck@seattle.gov</a></td>
</tr>
<tr>
<td>DPD Site Collection Admin</td>
<td>Shayne Shark</td>
<td>Department of Planning</td>
<td>733-9264</td>
<td><a href="mailto:Shayne.shark@seattle.gov">Shayne.shark@seattle.gov</a></td>
</tr>
<tr>
<td>FAS Site Collection Admin</td>
<td>Ivan Balbuena</td>
<td>Department of Finance Administrative Service</td>
<td>684-0519</td>
<td><a href="mailto:Ivan.Balbuena@seattle.gov">Ivan.Balbuena@seattle.gov</a></td>
</tr>
<tr>
<td>HSD Site Collection Admin</td>
<td>John Doke</td>
<td>Department of Human Services</td>
<td>615-0984</td>
<td><a href="mailto:John.doke@seattle.gov">John.doke@seattle.gov</a></td>
</tr>
</tbody>
</table>
Appendix D - for Site Leaders

Q: How can I become a Site Leader?
A: Site Leaders are designated by the Department Site Collection Administrator

Q: How do I request a Site?
A: Fill out the Site Request Form at: https://seattlegov.sharepoint.com/Lists/SiteRequest/NewForm.aspx
Or go to the SPO City of Seattle Homepage at https://seattlegov.sharepoint.com/ and scroll to Quick Links and select Site Request Form

Q: How do I decommission a Site?
A: Contact the Site Collection Administrator and ask for the site to be decommissioned.