

SharePoint Training – Using SharePoint

Last Updated: August 2023

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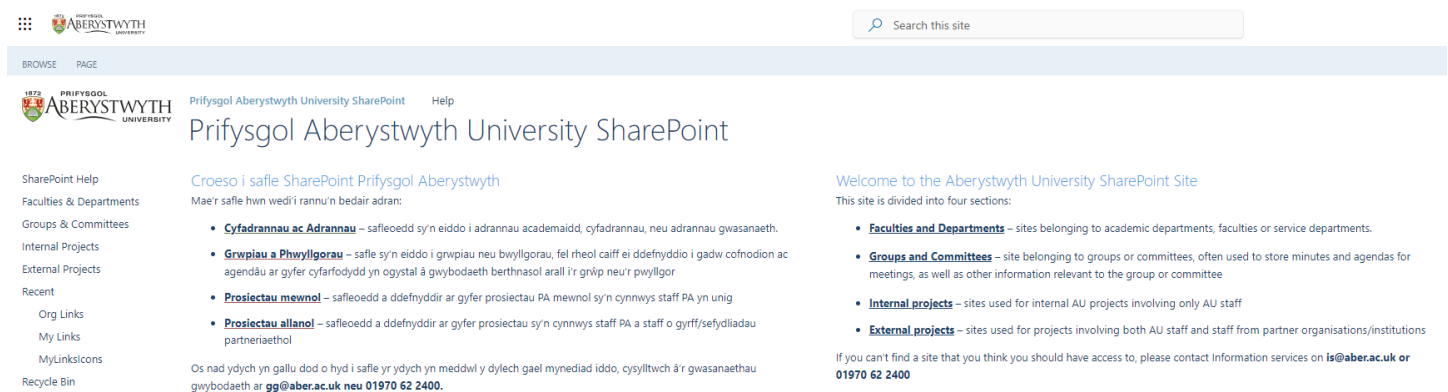
Training Evaluation Form:

<https://www.aber.ac.uk/en/is/it-services/web/training-evaluation/>

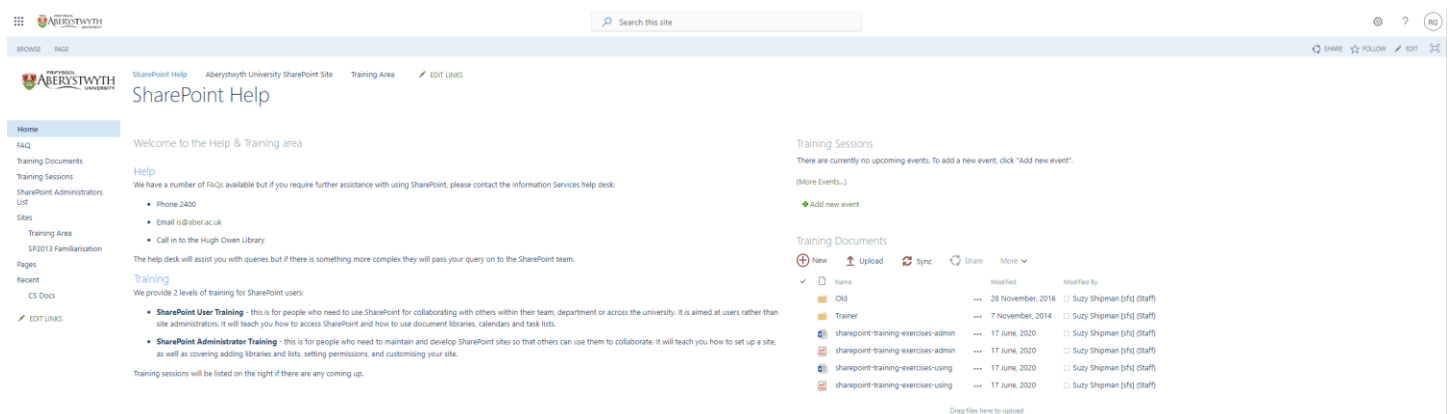
Exercise 1 – Accessing SharePoint

Before you can make use of SharePoint you need to know how to access it – you will access the site and navigate to the training area.

1. Open a browser
2. Type sharepoint.aber.ac.uk into the address bar.
3. Log in with your usual username and password.
4. You will see the main SharePoint page:

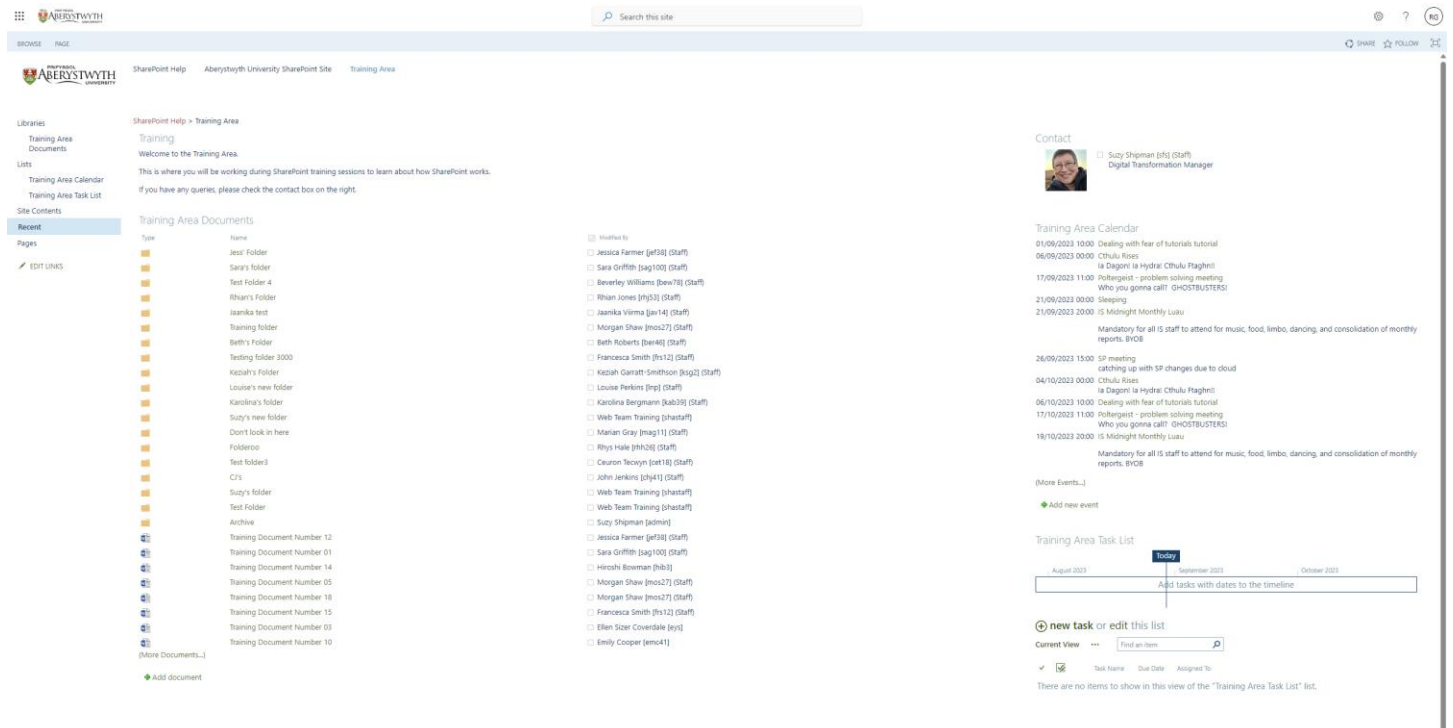


5. Find and click on “SharePoint Help” in the left menu
6. You will now see the Help & Training area:



7. Find and click on “Training Area” in the left menu (under Sites)

8. You should now see the Training Area:



SharePoint Help Aberystwyth University SharePoint Site Training Area

Libraries: Training Area Documents

Lists: Training Area Calendar, Training Area Task List

Site Contents: Recent

Training Area Documents

Type	Name
Folder	Home
Folder	Test Folder
Folder	Sara's folder
Folder	Test Folder 4
Folder	Rhian's Folder
Folder	Jaanka's test
Folder	Training folder
Folder	Beth's Folder
Folder	Testing folder 3000
Folder	Kaciah's folder
Folder	Louise's new folder
Folder	Karolina's folder
Folder	Suzy's new folder
Folder	Don't look in here
Folder	Folderoo
Folder	Test folder3
Folder	CI's
Folder	Suzy's folder
Folder	Test Folder
Folder	Archive
Document	Training Document Number 12
Document	Training Document Number 01
Document	Training Document Number 14
Document	Training Document Number 05
Document	Training Document Number 18
Document	Training Document Number 15
Document	Training Document Number 03
Document	Training Document Number 10

Number of items: 30

- Jessica Farmer (jef3) (Staff)
- Sara Griffith (sag100) (Staff)
- Beverley Williams (bew78) (Staff)
- Rhian Jones (rjh53) (Staff)
- Jaanka Verma (jav14) (Staff)
- Morgan Shaw (mos27) (Staff)
- Beth Roberts (ber48) (Staff)
- Francesca Smith (fs12) (Staff)
- Kaciah Garratt-Smithson (kgs2) (Staff)
- Louise Perkins (ljp) (Staff)
- Karolina Bergmann (kub39) (Staff)
- Web Team Training (shastaff)
- Manan Gray (mag11) (Staff)
- Rhys Hale (rhc2) (Staff)
- Clareon Steyn (cst18) (Staff)
- John Jenkins (jyj11) (Staff)
- Web Team Training (shastaff)
- Web Team Training (shastaff)
- Suzy Shipman (sadmin)
- Jessica Farmer (jef3) (Staff)
- Sara Griffith (sag100) (Staff)
- Hiroshi Bowman (hob3)
- Morgan Shaw (mos27) (Staff)
- Francesca Smith (fs12) (Staff)
- Ellen Sizer Coverdale (eys)
- Emily Cooper (emc41)

Training Area Calendar

- 01/09/2023 10:00 Dealing with fear of tutorials tutorial
- 06/09/2023 00:00 Cthulu Rises - Ia Dagon! Ia Hydral! Cthulu Ptahgn!!
- 17/09/2023 11:00 Poltergeist - problem solving meeting Who you gonna call! QHOSTBUSTERS!
- 21/09/2023 00:00 Sleeping
- 21/09/2023 20:00 IS Midnight Monthly Luau
 - Mandatory for all IS staff to attend for music, food, limbo, dancing, and consolidation of monthly reports. BYOB
- 26/09/2023 15:00 SP meeting catching up with SP changes due to cloud
- 04/10/2023 00:00 Cthulu Rises - Ia Dagon! Ia Hydral! Cthulu Ptahgn!!
- 06/10/2023 10:00 Dealing with fear of tutorials tutorial
- 17/10/2023 11:00 Poltergeist - problem solving meeting Who you gonna call! QHOSTBUSTERS!
- 18/10/2023 20:00 IS Midnight Monthly Luau
 - Mandatory for all IS staff to attend for music, food, limbo, dancing, and consolidation of monthly reports. BYOB

(More Events...)

+ Add new event

Training Area Task List

August 2023 | **Today** | September 2023 | October 2023

Add tasks with dates to the timeline

+ new task or edit this list

Current View: Find an item


Task Name	Due Date	Assigned To
There are no items to show in this view of the "Training Area Task List" list.		

Exercise 2 – Using the Document Library

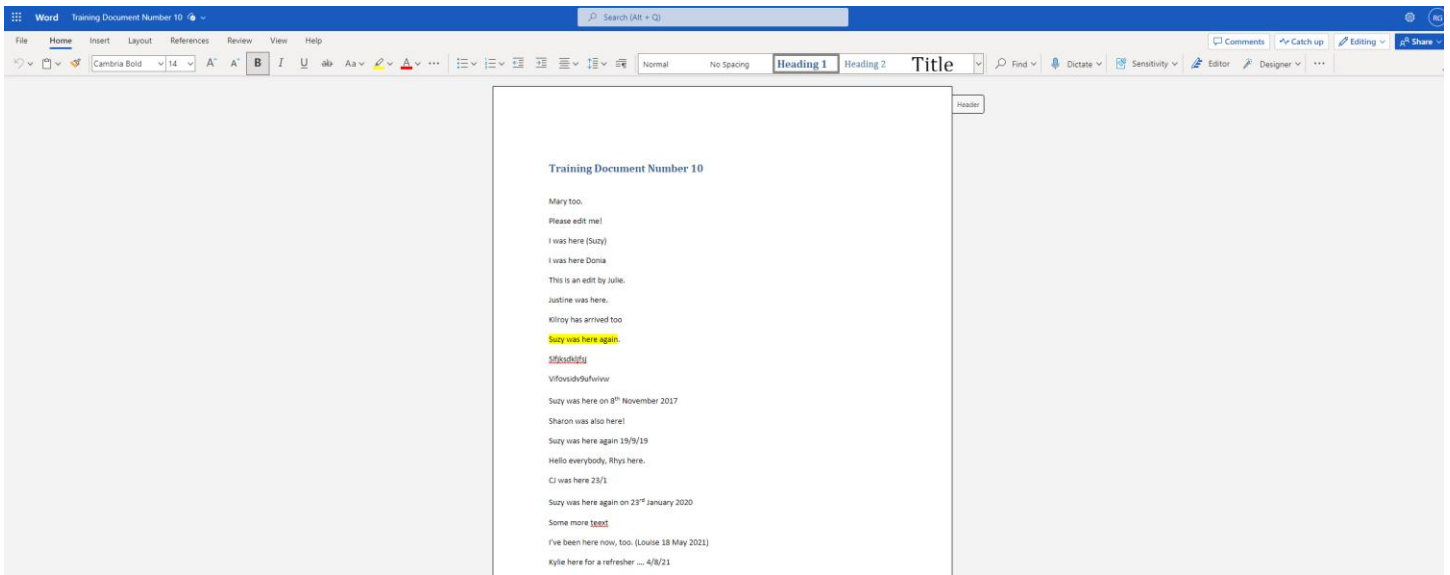
Document Libraries are used to store documents so that they can be accessed by yourself and other users. Depending on permissions these documents could be shared within a team or department, or with all SharePoint users. You will access a document library, view and edit a document, create a folder and add a document to it. You will also test out opening a document library in explorer.

Open and Edit a Document

1. Click on “Training Area Documents” in the left menu (under Libraries) - the Training Area Documents document library will be displayed:
2. Pick whichever document you like and click on its name.

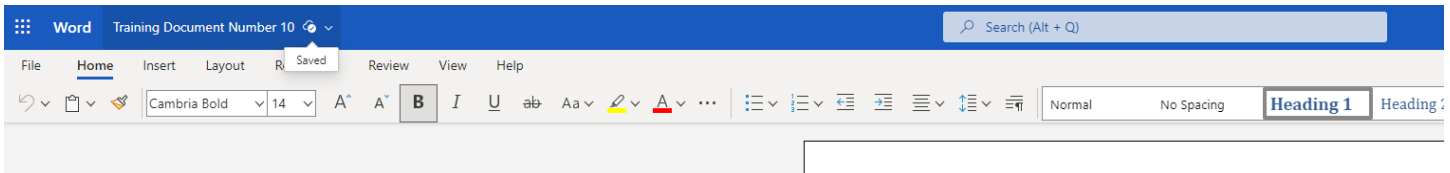
	Training Document Number 01.docx	27.0	27 March	Sara Griffith [sag100] (Staf
	Training Document Number 03.docx	20.0	19 May, 2022	Ellen Sizer Coverdale [eys]
	Training Document Number 05.docx	30.0	6 October, 2022	Morgan Shaw [mos27] (St
	Training Document Number 10.docx	18.0	13 May, 2022	Emily Cooper [emc41]
	Training Document Number 12.docx	13.0	7 August	Jessica Farmer [jef38] (Staf
	Training Document Number 14.docx	7.0	31 October, 2022	Hiroshi Bowman [hib3]
	Training Document Number 15.docx	11.0	12 August, 2022	Francesca Smith [frs12] (St
	Training Document Number 18.docx	5.0	6 October, 2022	Morgan Shaw [mos27] (St

3. The document will open in Word Online:



4. Make a change to the document by typing a line of text e.g. "This is an edit by Suzy"

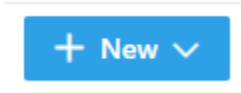
5. Wait until the 'Saving' text at the top of the screen has changed to 'Saved'



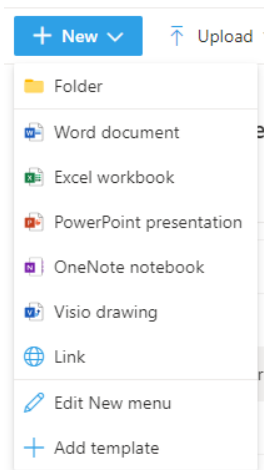
6. Close your current tab to return to the document library in SharePoint.

Create a New Folder

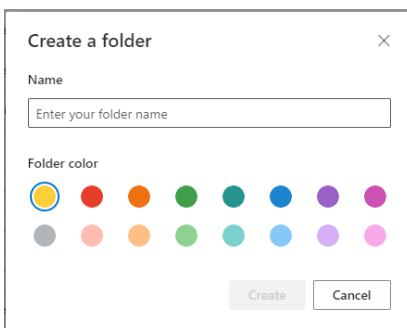
1. Click on New at the top of the page



2. Choose Folder from the menu that appears:




3. A pop-up will appear asking for the name of the new folder:



4. Type the name of the new folder in the box e.g. "Suzy's Folder" and click Create

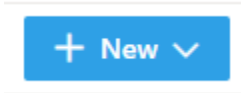
5. Your new folder will appear in the document library:

Training Area Documents 

	Name  		Version 	Modified 	Modified By 	+ Add column
	Jess' Folder   ...		1.0	7 August	Jessica Farmer [jef38] (Staff)	
	Karolina's folder		1.0	11 December, 2020	Karolina Bergmann [kab39]	
	Keziah's Folder		1.0	24 February, 2022	Keziah Garratt-Smithson [i]	
	Louise's new folder		1.0	18 May, 2021	Louise Perkins [lnp] (Staff)	
	 New Test Folder		1.0	A few seconds ago	Rhodri Gravell [rhg4] (Staff)	
	Rhian's Folder		1.0	17 January	Rhian Jones [rhj53] (Staff)	

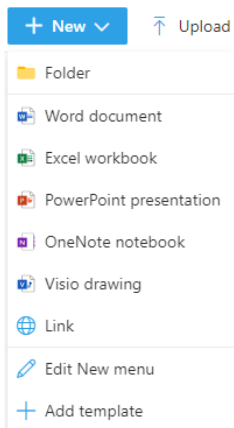
Add a Document into the Folder

1. Click on the name of the folder you created to open it



2. Click on 'New' at the top of the page

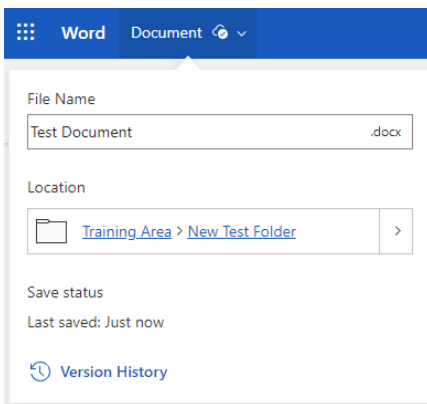
3. Choose 'Word document' from the menu that appears:



4. Your new document will open in Word Online.

5. Write some text in the document.

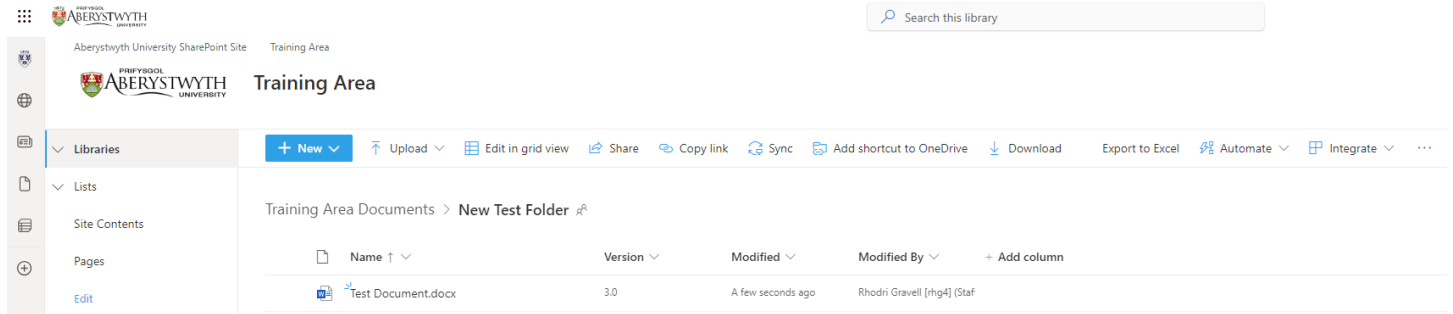
6. Click on 'Document' in the bar at the top of the screen and give your document a sensible name e.g. Suzy's Lovely Document. Click Enter to save the new name.



7. Wait until the 'Saving' text at the top of the screen has changed to 'Saved'

8. Close your current tab to return to your folder in the document library in SharePoint.

9. Your new document will be listed in your folder:



The screenshot shows the SharePoint interface for the 'Training Area' document library. The breadcrumb path is 'Training Area Documents > New Test Folder'. A table lists the contents of the folder:

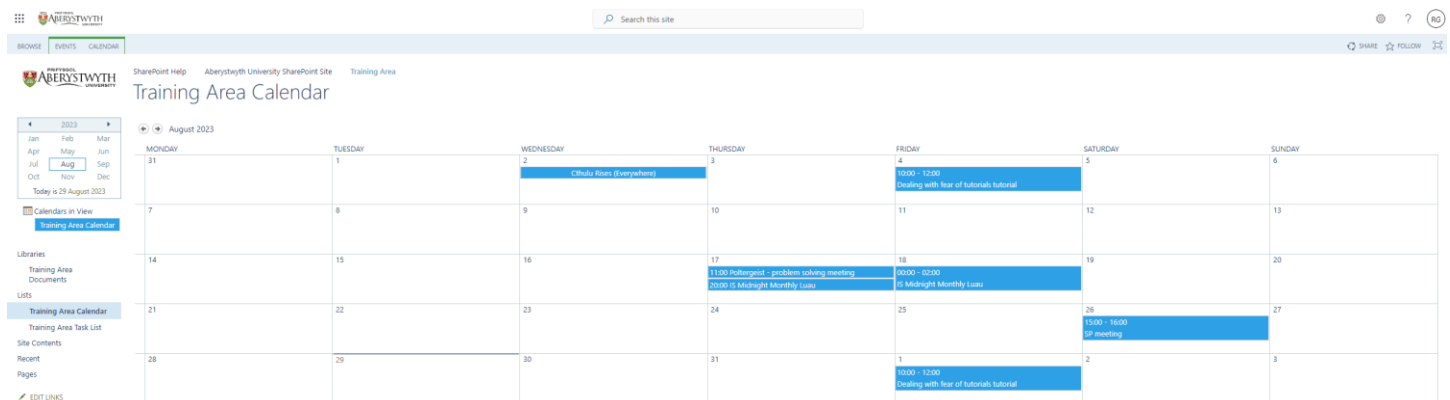
Name	Version	Modified	Modified By	+ Add column
Test Document.docx	3.0	A few seconds ago	Rhodri Gravel [rhg4] (Staf	

Exercise 3 – Using Calendars

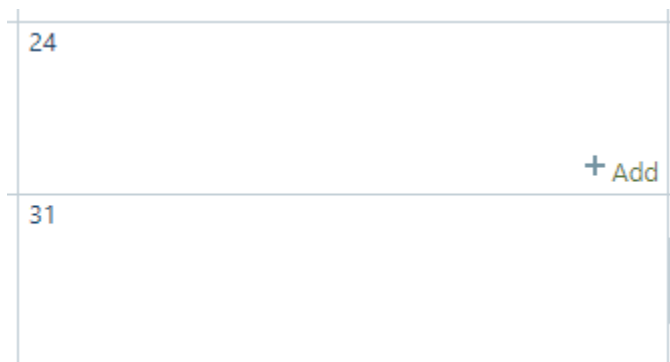
Calendars are used in SharePoint to store events related to a group, so that they can be accessed by all the members of the group. The group could be a team, department or project group or even the whole of the university. You will access a calendar, create an event and edit a different event.

Access the calendar and create an event

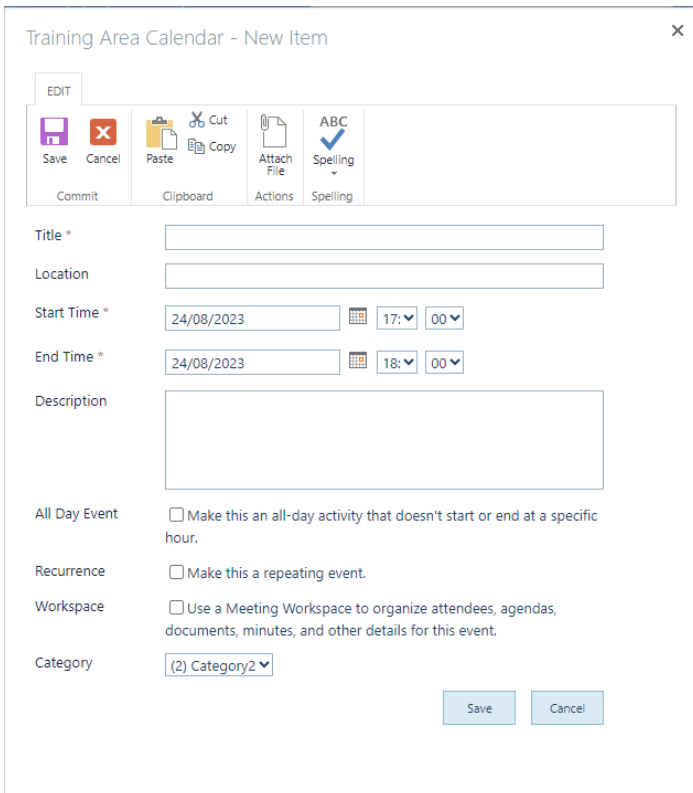
1. Click on "Training Area Calendar" in the left menu (under Lists) - the Training Area Calendar will be displayed:



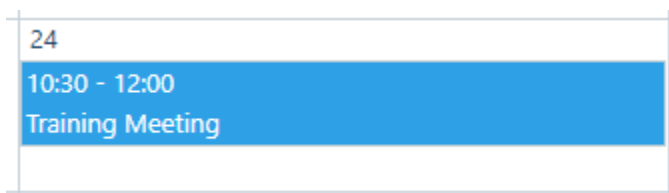
2. Choose a date to add your event to and place your mouse in its box. The Add link will appear



3. Click on the Add link
4. The New Item pop-up will appear:



5. Fill in the details of your event. It must have a title, a start time and an end time (unless you tick the "All Day Event" box). You can also add a description of the event to give further details.
6. Click the Save button to finish.
7. You should now see your event in the calendar:



Edit a Calendar Event

1. Pick one of the events that someone else has added to the calendar and click on it.
2. Information about the event will appear:

The screenshot shows the 'VIEW' tab selected in the top navigation bar. The interface includes a 'CUSTOM COMMANDS' section with icons for 'Edit Item', 'Edit Series', 'Delete Item', 'Manage', 'Version History', 'Alert Me', 'Shared With', 'Workflows', and 'Actions'. On the left, a sidebar lists navigation options: Libraries, Training Area Documents, Lists, Training Area Calendar, Training Area Task List, Site Contents, Recent (highlighted), Pages, and EDIT LINKS. The main content area displays event details for 'Dealing with fear of tutorials tutorial', including Location, Start Time (04/08/2023 10:00), End Time (04/08/2023 12:00), Description (All Day Event), Recurrence (Every 1 month(s) on the first Friday), Workspace, and Category ((2) Category2). At the bottom, it shows 'Content Type: Event', creation/modification dates, and a 'Close' button.

3. Click the Edit Item button (top left).

4. The event editor will appear:

The screenshot shows the 'EDIT' tab selected. The top navigation bar now includes 'EDIT' and 'BROWSE'. The 'CUSTOM COMMANDS' section has changed to include 'Save', 'Cancel', 'Paste', 'Copy', 'Delete Item', 'Edit Series', 'Attach File', 'ABC', and 'Spelling'. The main content area is a form for editing the event. Fields include: Title (Dealing with fear of tutorials tutorial), Location (empty), Start Time (04/08/2023 10:00), End Time (04/08/2023 12:00), Description (empty text area), All Day Event (checkbox), Recurrence (Every 1 month(s) on the first Friday), and Category ((2) Category2). At the bottom, it shows creation/modification dates and 'Save' and 'Cancel' buttons.

5. Edit the Date of the event. Click Save to finish.

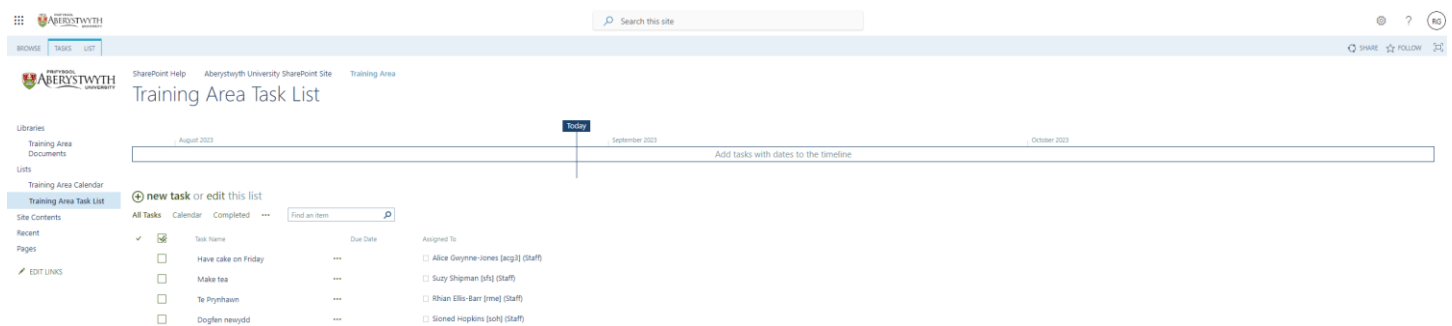
6. The event will now be displayed on the new date in the calendar.

Exercise 4 – Using Task List

Task Lists are used in SharePoint to store tasks related to a group, so that they can be accessed by all the members of the group. Each task can be allocated to a specific person so that they can keep track of the tasks they need to complete. You will access a task list, create a task for another member of the group and edit a task that has been assigned to you.

Access the task list and create a task

1. Click on “Training Area Task List” in the left menu (under Lists) - the Training Area Task List will be displayed:



2. Click on ‘new task’ at the top of the list

+ new task or edit this list

All Tasks Calendar Completed ...

3. The New Item screen will appear:

The screenshot shows the SharePoint task form in the 'EDIT' tab. The ribbon includes 'BROWSE' and 'EDIT' buttons. The ribbon groups are: 'Commit' (Save, Cancel), 'Clipboard' (Paste, Copy), 'Actions' (Attach File), and 'Spelling' (ABC, Spelling). The left sidebar shows 'Libraries' (Training Area Documents), 'Lists' (Training Area Calendar, Training Area Task List), 'Site Contents', 'Recent', and 'Pages'. A yellow information banner states: 'The content of this item will be sent as an e-mail message to the person or group assigned to the item.' The form fields include: 'Task Name *' (text box), 'Start Date' (calendar icon), 'Due Date' (calendar icon), 'Assigned To' (text box with placeholder 'Enter names or email addresses...'), and 'SHOW MORE' (text link). At the bottom right are 'Save' and 'Cancel' buttons.

4. Click 'SHOW MORE' to see all the options.

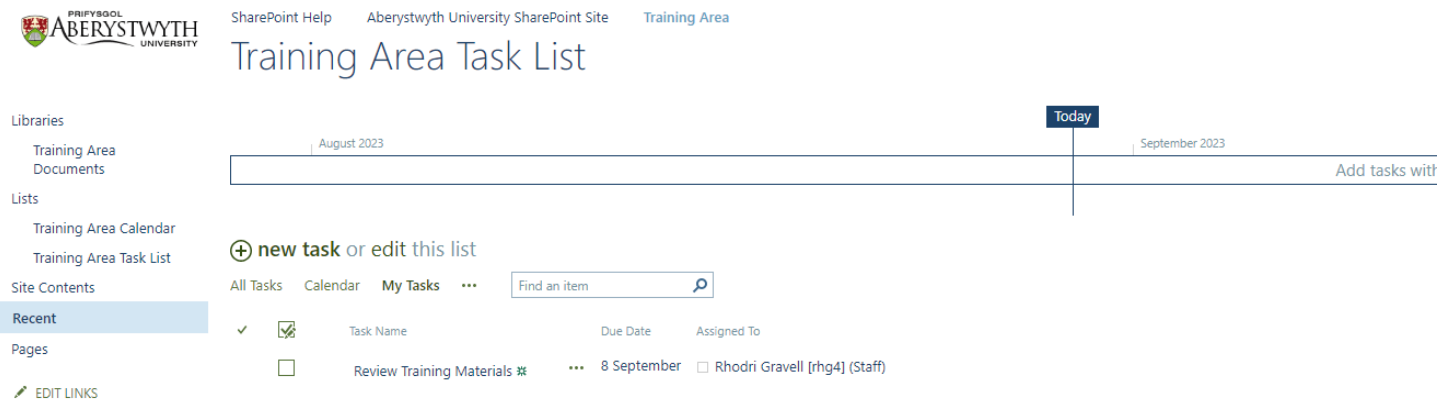
This screenshot shows the same SharePoint task form, but with the 'SHOW MORE' button expanded to reveal additional fields. The ribbon and sidebar are identical to the previous screenshot. The expanded form includes: 'Task Name *' (text box), 'Start Date' (calendar icon), 'Due Date' (calendar icon), 'Assigned To' (text box with placeholder 'Enter names or email addresses...'), '% Complete' (text box with '0' and a '%' sign), 'Description' (large text area), 'Predecessors' (a list of task names with 'Add >' and '< Remove' buttons), 'Priority' (dropdown menu showing '(2) Normal'), and 'Task Status' (dropdown menu showing 'Not Started'). 'Save' and 'Cancel' buttons are at the bottom right.

5. Enter the details of the task:

- Give the task a name
- Give the task a start date and due date.
- Assign the task to the person next to you, by typing their name or userid in the Assigned To box and choosing them from the list that appears.
- Add a description of the task if required.
- You can choose a 'predecessor' if required – this is a task that needs to have been done before this task can be started.
- Choose a priority for the task.

6. Click Save to finish.

7. Your new task will now appear in the Task List:



SharePoint Help Aberystwyth University SharePoint Site Training Area

Training Area Task List

Libraries: Training Area Documents

Lists: Training Area Calendar, Training Area Task List

Site Contents

Recent

Pages

EDIT LINKS

August 2023 | Today | September 2023

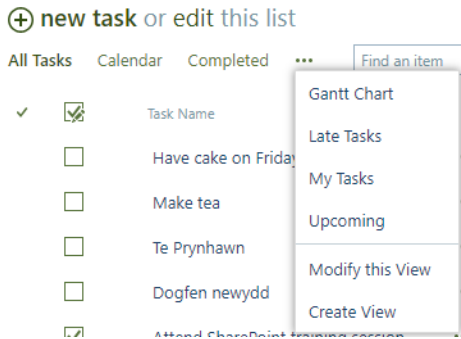
new task or edit this list

All Tasks Calendar My Tasks Find an item

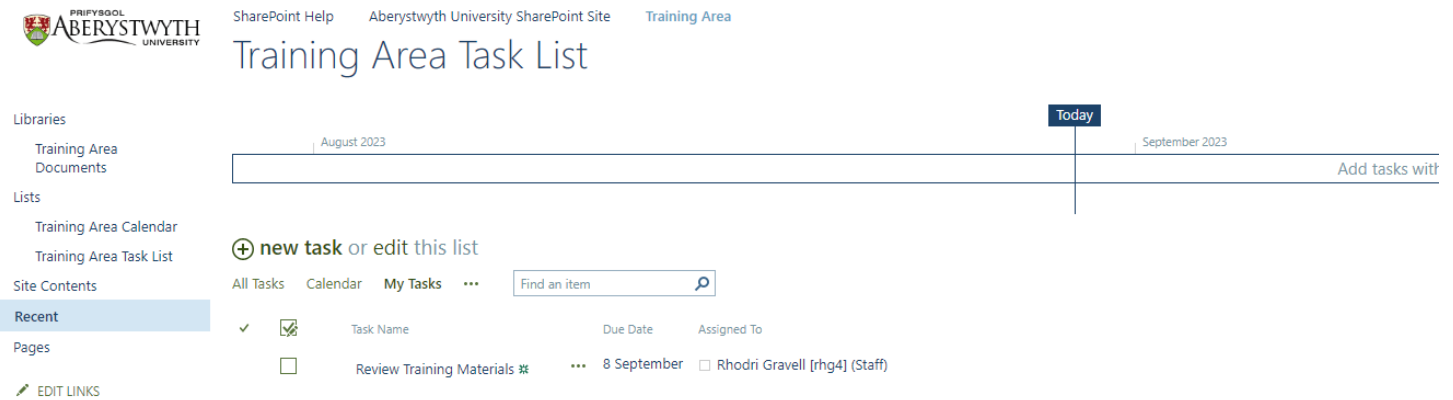
Task Name	Due Date	Assigned To
Review Training Materials #	8 September	Rhodri Gravell [rhg4] (Staff)

View tasks that have been assigned to you

1. Click on the ... at the top of the task list (next to All Tasks Calendar Completed) and choose 'My Tasks':

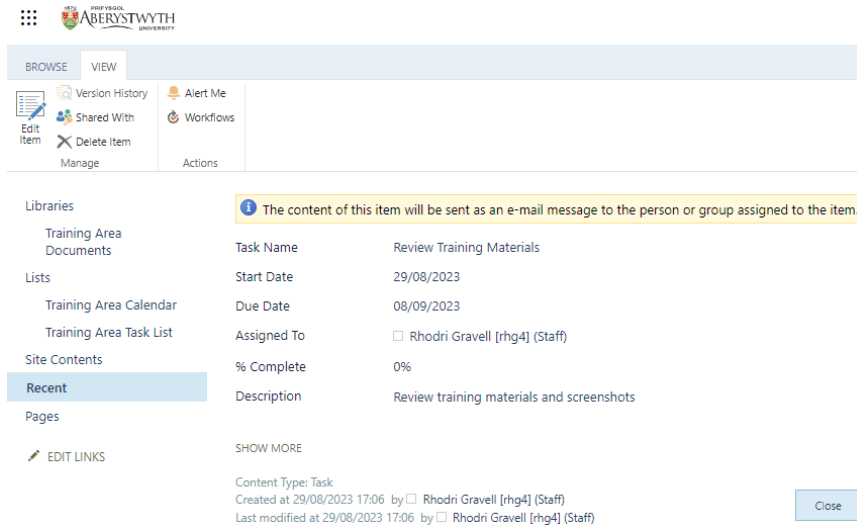


2. Only the tasks that are assigned to you will be displayed:



Edit a Task that has been assigned to you

1. Click on the name of a task to open it:



VIEW

Version History | Alert Me | Workflows

Edit Item | Shared With | Delete Item | Manage | Actions

Libraries

- Training Area Documents
- Lists
 - Training Area Calendar
 - Training Area Task List
- Site Contents
- Recent**
- Pages

[EDIT LINKS](#)

Task Details:

- Task Name:** Review Training Materials
- Start Date:** 29/08/2023
- Due Date:** 08/09/2023
- Assigned To:** Rhodri Gravell [rhg4] (Staff)
- % Complete:** 0%
- Description:** Review training materials and screenshots

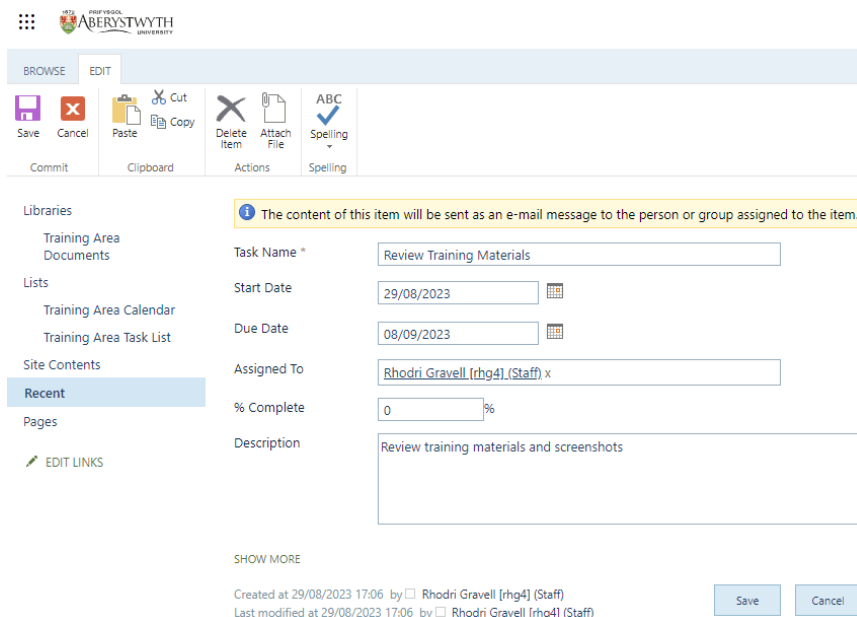
[SHOW MORE](#)

Content Type: Task
Created at 29/08/2023 17:06 by Rhodri Gravell [rhg4] (Staff)
Last modified at 29/08/2023 17:06 by Rhodri Gravell [rhg4] (Staff)

[Close](#)

2. Click the Edit Item button (top left).

3. The Edit item screen will appear:



EDIT

Save | Cancel | Paste | Copy | Delete Item | Attach File | Spelling

Commit | Clipboard | Actions | Spelling

Libraries

- Training Area Documents
- Lists
 - Training Area Calendar
 - Training Area Task List
- Site Contents
- Recent**
- Pages

[EDIT LINKS](#)

Task Details:

- Task Name *:** Review Training Materials
- Start Date:** 29/08/2023
- Due Date:** 08/09/2023
- Assigned To:** Rhodri Gravell [rhg4] (Staff) x
- % Complete:** 0%
- Description:** Review training materials and screenshots

[SHOW MORE](#)

Created at 29/08/2023 17:06 by Rhodri Gravell [rhg4] (Staff)
Last modified at 29/08/2023 17:06 by Rhodri Gravell [rhg4] (Staff)

[Save](#) [Cancel](#)

4. Mark the task as completed by clicking 'SHOW MORE' then selecting 'Completed' from the Task Status drop-down list.

5. Click Save to finish. The task will now show as crossed though.