

Introduction

SharePoint Online provides a platform for creating collaborative websites to share documents and information with colleagues, partners, and customers. All UCSF users with an active ucsf.edu email address have access to SharePoint online.

Types of SharePoint Sites

There are two types of SharePoint sites with slight navigational and conceptual differences.

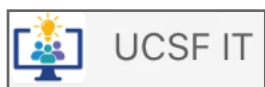
- **Communication Site** - Provides content to stakeholders and requires a ticket with UCSF IT to create.
- **Microsoft Teams SharePoint Site** – Site is created automatically as it is the storage location for your files within Teams to collaborate with colleagues!

Access Information

There are several methods for accessing Microsoft SharePoint. We will first begin with accessing SharePoint from Microsoft Teams.

Accessing SharePoint from Teams

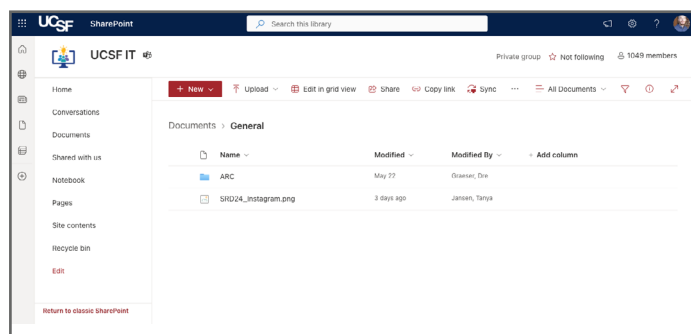
1. Select any **Team** that you are currently a member of before selecting the desired channel.



2. Click the **Files** tab.

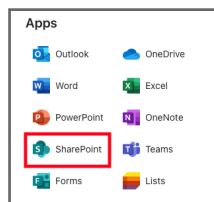
3. Once the *Files* tab loads, select **...** then the **Open in SharePoint** option.

4. As you can see, SharePoint mirrors the view of the Files tab in MS Teams!



Accessing SharePoint from Microsoft 365

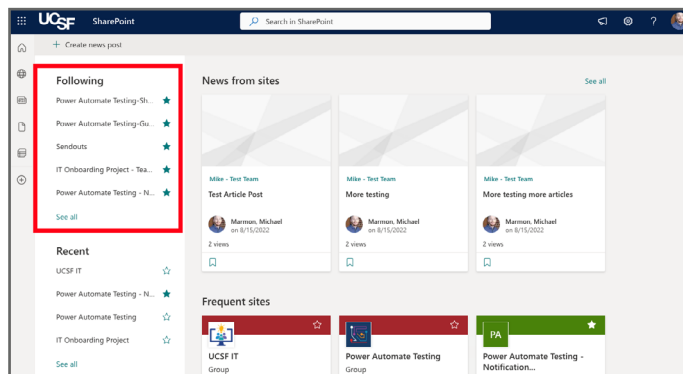
1. Open an any application within Microsoft 365.
2. Select the **App Launcher** () icon.
3. Select the **SharePoint** icon from the list of available applications.



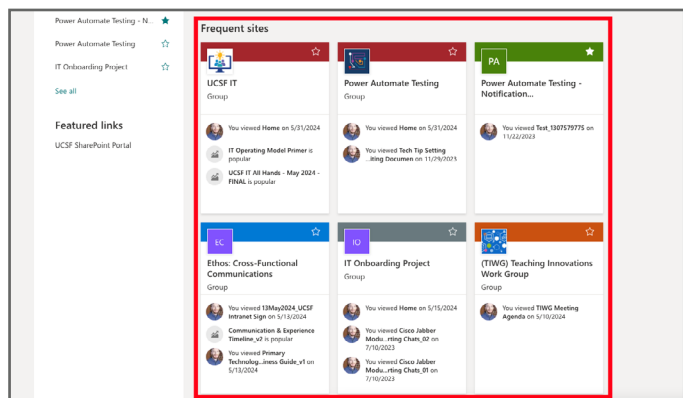
Navigating SharePoint

Once *SharePoint* loads, you will notice several options in the left navigation bar, which will allow you to return to the SharePoint homepage (), access your SharePoint sites (), as well as your News (), Files (), and Lists ().

The **Following** panel will provide you with a list of SharePoint sites that you are following and recently accessed sites.

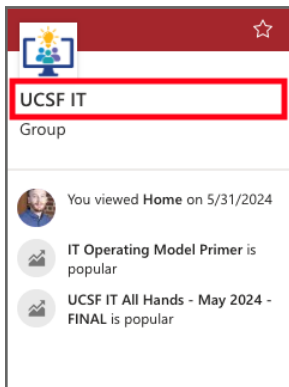


The **Frequent sites** area will provide you with a view of SharePoint sites associated with Microsoft Teams that you use frequently in your work.



Loading a SharePoint Site

To **access** a SharePoint site, you can select the **name** of the site from either the **Following**, **Recent** or **Frequent Sites** areas within SharePoint.



SharePoint Site Navigation

Once the SharePoint site loads, you will notice the Title of the site and the Teams icon indicating that the site is associated with a team within Microsoft Teams.

- **Top Navigation** – Provides the ability to customize your site and review page details and analytics associated with it.



- **Left-hand navigation** – Allows users to your SharePoint conversations () in Outlook, your SharePoint files (), as well as your Pages () and SharePoint recycle bin ().

- **News portlet** – Allows you to create a News Article to share relevant information with your stakeholders.

1. Select the dropdown to add an **article** or **link**.

NOTE: You can also select the button to create a new article.

- **Activity** – Provides quick access to your recently used files in SharePoint.

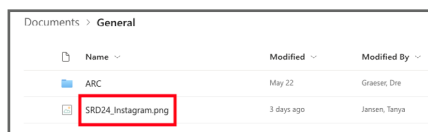
Accessing Files in SharePoint

1. Click the link in the left-hand navigation.
2. Select either the **In Channels** or **In Site** library option.



NOTE: The *In Channels* options show all the files within your Teams' channels and *In Site* provides an alternative path for accessing the files within your General Channel.

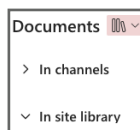
3. Select the **File Name** to access it within the applicable application.



Creating Files or Folders within SharePoint

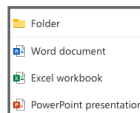
Create Files

1. Select the link.
2. Navigate to the desired file location within the folders located in the **In Channels** or **In site** library.



3. Click the button.

4. Select the desired **document type** (e.g., Word, Excel, PowerPoint).



5. A **blank document** loads in a new browser tab.

6. Select the **document title** field to enter a *unique filename*.



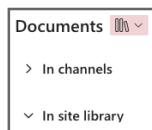
NOTE: You can upload files to SharePoint by selecting the button then the option. From the dialog box, navigate to and select the desired file before clicking the button to upload it to SharePoint.

Creating Files or Folders within SharePoint (continued)

Creating Folders

1. Select the  link.

2. Navigate to the desired file location within the folders located in the **In Channels** or **In site library**.

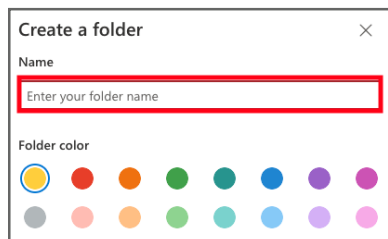


3. Click the  button.

4. Select the  option.



NOTE: Uploaded folders will include the files and subfolders within it.

5. Enter a **Name** for the folder and select a **color**.



6. Click the  button.


7. File created successfully.

NOTE: Folders can be updated to SharePoint by selecting the  button then the  option. From the dialog box, navigate and select the desired folder.

Sharing Files and Folders from SharePoint

NOTE: You can share a SharePoint Site with other users by selecting the **Share** button from the Site homepage.

1. Navigate to the *file* or *folder* to be shared.


2. Hover over the file or folder then select the  next to their name.

3. Select the  icon.

4. Insert the following within the dialog window:

a. Add the intended **recipient's name** or **email address**.

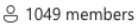



b. Set the **Permission Levels** () for the site (e.g., Can edit, Can view, Can't download).

c. Enter a **message** describing the site to the recipient.




d. Click  button to send the invitation.

NOTE: Additionally, you can select the **Members** option () then the  button before entering their *name* to provide access to the site.

Delete Files or Folders within SharePoint

1. Navigate to the *file* or *folder* to be deleted.




2. Hover over the *file* or *folder* then select the  next to their name.

3. Select the  option.


4. Click the  button.

5. User receives a *notification* that a file has been deleted.



NOTE: If a file or folder is accidentally deleted, it can be *restored* from the . Select the  next to the file or folder before selecting the  button.

SharePoint Pages

The **Pages** feature within SharePoint are useful for providing information to your team, colleagues, and stakeholders. To access the *Pages* section of your SharePoint site, select the  link from the left-hand navigation.


SharePoint Pages (continued)


Navigating and Customizing SharePoint Pages

After the *Site Pages* screen loads, you will see the **Home.aspx** page, which is the landing page for your site.

Site Pages			
Name	Modified By	Modified	Created
Created By : System Account (1)			
Home.aspx	Marmon, Michael	May 6	March 4, 2023

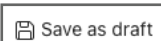
1. Navigate to your *SharePoint landing page*.


2. After the landing page loads, select the  button to edit the available portlets, information and layout.

3. To add new sections or templates, select the  button before selecting one of the available options.


NOTE: You can add formatting by selecting the **Edit Section** icon, *move* the section on the page, *duplicate* it or *remove* the section.




4. Click the  draft option.

5. Once you have completed your changes, select the  button to make your changes available to your colleagues and stakeholders.

Creating Pages in SharePoint

1. Select the  link.

2. Click the  button.

3. Select the  option.

4. On the **New Item** page, enter a new **Page Name**.

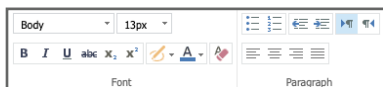
New page name:


Find it at: <https://ucsfonline.sharepoint.com/sites/Text532/SitePages>


5. Click the  button.

6. The new *Page* editor will load successfully to provide you with the ability to:

a. **Format** your page.



b.  the page (e.g., Limit others to edit the page while you work on it)

c. Select the  tab to insert **tables**, **pictures**, **links** or **embed code** into your page.



d. Once satisfied with your page, select the  tab then the **Save and Publish** option to make it available to those with access to your SharePoint site.

