Staff
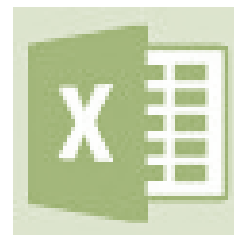# IT Skills
Sessions

IT ESSENTIALS – Working with Your Office 365 Sites For all users (ST663a)

June 2016

ROYAL
HOLLOWAY
UNIVERSITY
OF LONDON

28th June 2016

Working with Your Office 365 Sites For All Users

**These Session Notes are available in alternative formats on request. For further information
please contact Chris Horton in Computer Centre Room 102.
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Getting Started with your Office 365 Sites

1. What Can Office 365 Sites Help You With?

- Sharing documents with other users, choosing whether they can edit or view only, without needing to ask IT Services for access
- Access, upload and edit documents anywhere, on all devices (no VPN needed)
- Online editing for Word, Excel, PowerPoint and OneNote without needing these programs installed on your phone or tablet
- Multiple users can edit documents at the same time – avoiding the problems of documents being locked, and the work involved in merging changes to a document
- Eliminates the need to circulate documents via email, with multiple versions becoming confusing
- Powerful search function to search for documents across all your sites
- Version control allows you to return to a previous version of the same document, without having to save it with a different filename.

2. Accessing your Office 365 Sites using a PC/Laptop

a. In a later browser (e.g. IE 9 or later) go to: **mail.rhul.ac.uk**

b. At the left of the Office 365 bar at the top of the window, click on the Apps Launcher button to display the **Apps Launcher** pane

c. Click on **Sites** at the right of the **Apps Launcher** pane to display your **Sites** Homepage

d. There are three different Site formats available:

    i. **Department Sites** – which are Sites set up for each particular department, or sub-department (where one exists)

    ii. **Project Sites** – which are Sites setup for particular projects so that the people working on the project can easily share information and files

    iii. **Virtual Team Sites** – which are Sites for cross-department group collaboration, e.g. Library Users Advisory Group; Academic Board

e. For example, click on the **Departments** graphic towards the top left of the window

f. The Department Sites currently available to you are displayed under the **My Department Links** heading

g. Click on the Site you wish to view to display it

h. If the Site you are viewing includes sub-Sites they can be accessed from the menu listing towards the top of the window
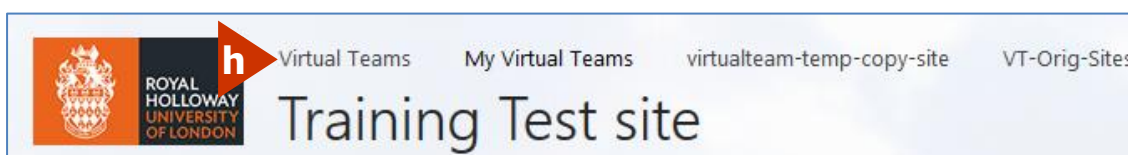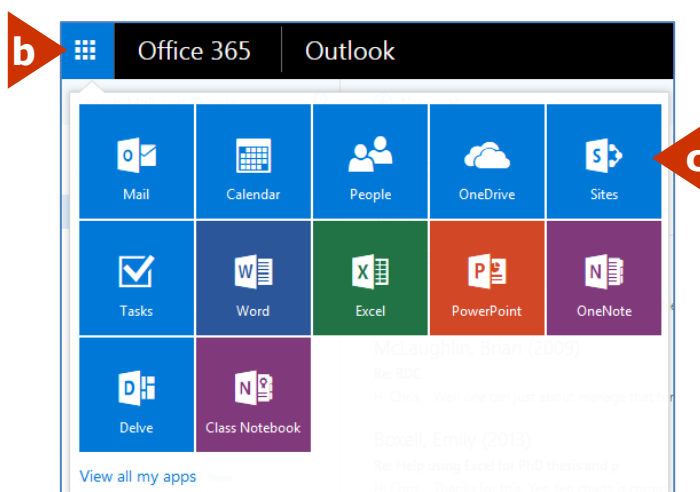
3. Accessing your Office 365 Sites using an iPad

An iPad can be used to access most features within a Site with the exception of: uploading files, working with files using Windows Explorer, and enabling a Sites' Calendar in Outlook

a. Before starting **ensure** you have **Followed** the Sites you wish to view on an iPad so that they appear on your Site's Homepage (see Section **How to Follow a Site so it appears on your Homepage**)

b. Using a later browser (e.g. Safari) go to: **mail.rhul.ac.uk**

c. When your e-mails display tap the 3 rectangles button at the bottom left of the screen
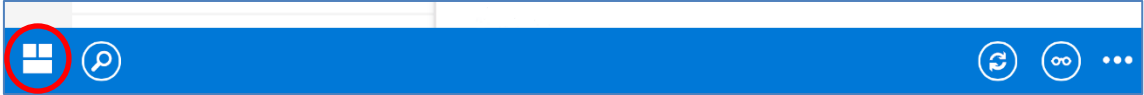
d. When the screen displays showing options to access Outlook, Calendar and People tap the **Office 365** link at the bottom left
Note: You may need to display the screen in portrait mode for this to display/work properly, and/or reload the page

e. Tap **Sites** on the menu that displays to open your Office 365 Sites Homepage
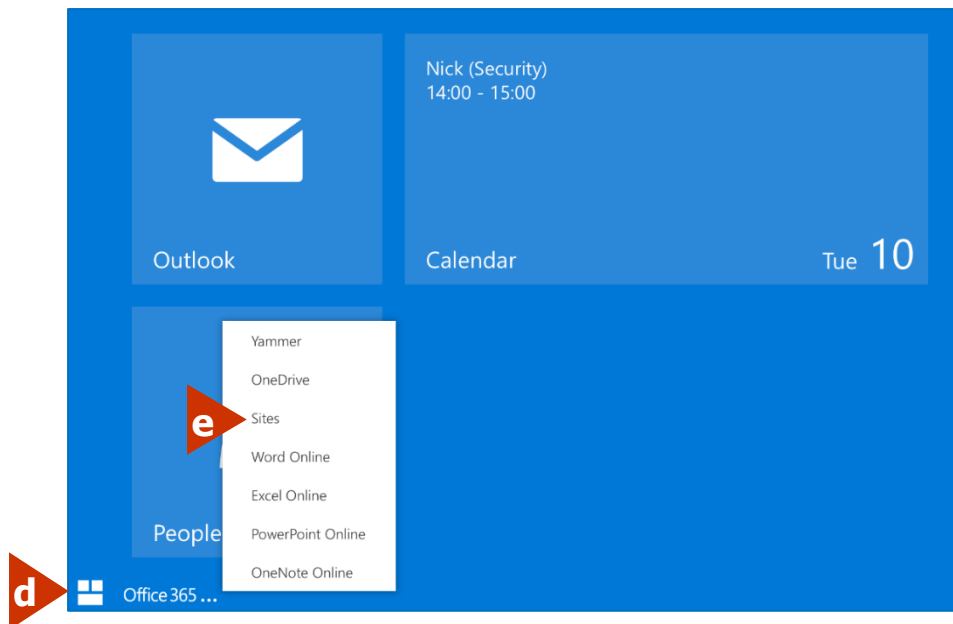
Changing the iPad view of your Site's pages
When first displayed, your Office 365 Site may look different to how it displays on a PC. However, if you prefer, this can be changed to make it appear very similar:

a. Tap the **ellipses** button (three dots) at the bottom right of the screen
b. Tap **switch to pc view**

4. The Main Office 365 Sites Components

a. **Announcements**
This provides a 'notice board' type area where team members can enter notes etc. for all team members to see

b. **Documents**
This is the location where team members store documents for all to access

c. **Calendar**
This enables meetings etc. to be added to a dedicated Calendar that all of the team can use. They can also add this Calendar to Outlook

d. **Links**
Provides a location for links to relevant webpages to be easily accessed

5. What is OneDrive?

OneDrive is your personal cloud based document storage area provided by Microsoft as part of Office 365, and where files that have been shared with you are located

Because of its ability to share files with others, OneDrive is often referred to as a **document library** – as in a conventional book library where books (files) are stored, and then shared (borrowed) with those who have been given permission

Remember: Your personal OneDrive content is separate to your Office 365 Sites content

6. Returning to a Site's Homepage

While working with your Office 365 Site, you may find occasions when there is no clear way of moving away from the currently displayed page

Should this happen you can return to the Site's main page by:

- Clicking on the Royal Holloway logo at the top-left of the window
- Clicking on the **Home** link from the menu on the left of the window
- Clicking on the browser's Back arrow

7. How to Follow a Site so it appears on your Homepage

When needing to access a number of different Sites it can be extremely useful to apply the **Follow** option to the Sites.

By doing this an icon for each Site is added to your Homepage, thus providing an easy way of accessing each one. To do this:

a. Display the Site you wish to follow
b. Click on **Follow** at the top right of the window
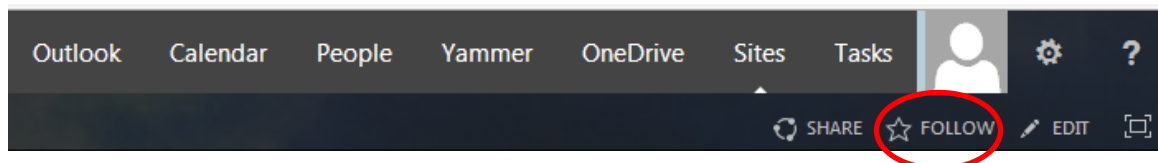
8. Removing unwanted Followed Sites from your Homepage

a. Ensure your Sites Homepage is displaying
b. Click on the **ellipses** button (three dots) to the right of the Site you wish to remove
c. Click on **Stop following** from the menu that displays to remove the Site's icon from the page

Working with Folders and Files within your Office 365 Sites

9. Creating a Folder within your Office 365 Site

    a. Under the **Documents** heading click **New**

    b. Click on **New folder** at the bottom of the menu that displays
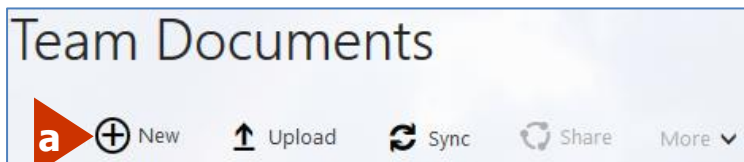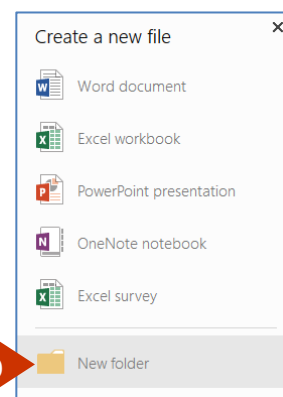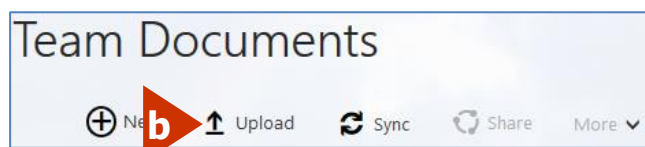
    c. In the **Create a folder** dialogue box that displays enter a name for the new folder in the **Name** panel

    d. Click on **Create**

10. Using Upload to add Files from your (Y:) drive etc. to your Site

    a. If you want the file to be saved in a folder click on the folder under the **Documents** heading to open it

    b. Under the **Documents** heading click **upload** to display the **Add a document** dialogue box

    c. Click **Browse** towards the top-right of the dialogue box to display the **File Upload** dialogue box

    d. In the left-hand panel locate the drive where the file is currently stored, then click on it to display its content in the right-hand panel

    e. In the right-hand panel navigate to the required file and then click on it to select it

    f. Click on **Open** to close the **File Upload** dialogue box and insert the file's path into the **Choose a file** panel

    g. If the file already exists on your Site, and you do **not** want to overwrite it, ensure the **Add as a new version to existing files** check box displays a tick mark
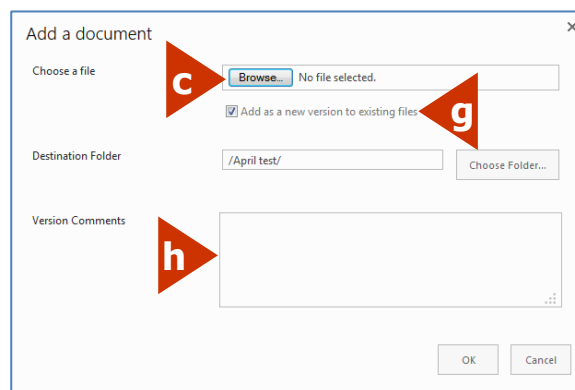
    h. If appropriate, add a suitable comment into the **Version Comments** panel

    i. Click **OK** to add the file to your Site
Note: For an alternative method see the section: **Moving and Copying Files using Windows Explorer**

11. Moving and Copying Files using Windows Explorer

When working within your Office 365 Sites you do not have the ability to directly move or copy files. When wanting to do this you need to use the Windows Explorer facility that is included as part of the **Library** Ribbon. This enables you to see both the files and folders within your Site, along with the contents of (e.g.) your **(Y:)** drive and **(N:)** drive

Note: This will probably work only when viewing your Site using Internet Explorer

To access this:

a. Ensure that just the **Documents** heading is displaying in the main window
b. Click on the **Library** tab towards the top-left of the window to display the **Library Ribbon** below it
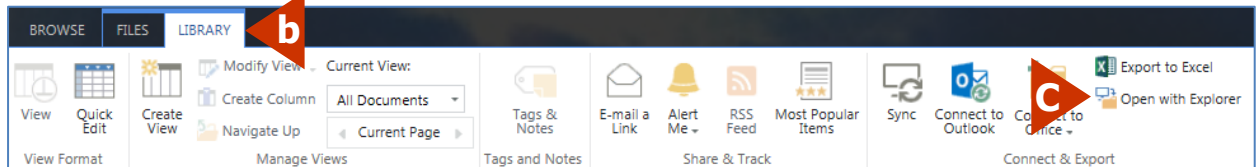
c. Click on **Open with Explorer** in the **Connect & Export** group towards the centre-right of the **Ribbon**
d. If the **Is this a private computer?** dialogue box displays click **This is a private computer**
e. **If a dialogue box displays** stating: **having trouble opening this library in File Explorer** click on its black **X Close** button and then repeat steps **c.** and **d.**
   This normally resolves the problem on the 2nd or 3rd attempt
f. Windows Explorer opens in its normal window with your files and folders displayed in the right-hand panel, and your **(Y:)** drive etc. in the left-hand panel
g. You can then move, copy, and delete files and folders in the normal way

h. **If** whilst doing this the **Copy File** dialogue box displays stating: **An unexpected error is keeping you from copying the file**, you need to restart Windows explorer, as this frequently resolves the problem. To do this:

   i. Close the **Copy file** dialogue box by clicking on its red **X Close** button
   ii. Then close all occurrences of Windows Explorer that are open by clicking on their red **X Close** button
   iii. Then repeat steps **c.** and **d.** to reopen Windows Explorer
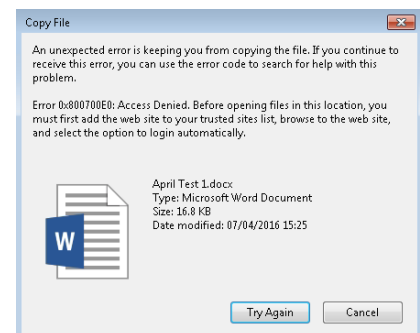
Opening a second copy of Windows Explorer

A problem with using Windows Explorer in this above way is that should you expand e.g. your **(Y:)** drive to display its content in the right-hand panel you will be unable to redisplay your Office 365 Sites files in the panel.

To overcome this problem a second copy of Windows Explorer can be opened so that you can work between the two copies.

To open a second copy of Windows Explorer:

a. Ensure that Windows Explorer is displaying on screen
b. In the Taskbar at the bottom of the screen right-click on the **Windows Explorer** icon
c. Click on **Windows Explorer** from the menu that displays

d. The two copies can then be repositioned on screen to enable you to click and drag or Copy and Paste files and folders between the two Windows Explorer copies
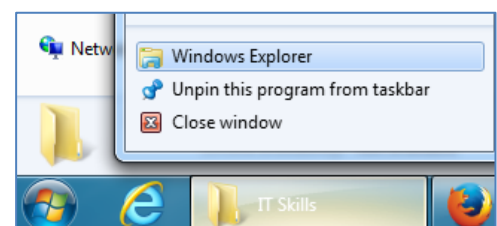
12.   Creating new Word/Excel/PowerPoint/OneNote files on your Office 365 Site

a. Ensure that the **Documents** heading is displaying towards the top of the window

a. If the file is to be saved in a folder click on the folder under the **Documents** heading to open it

b. Under the **Documents** heading click **New** to display the **Create a new file** dialogue box

c. Click on the option for the file type to be created

d. The file is opened in the online version of the relevant application
Remember: Office 365 Sites will automatically save the changes that you make to the file
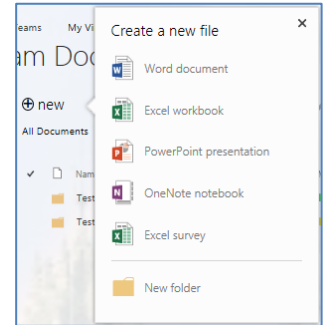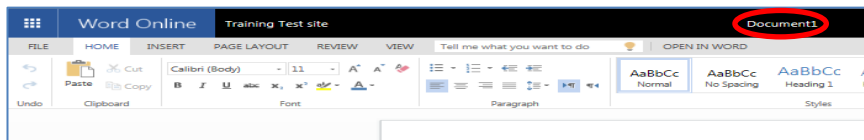
To set or change the file's filename

When a file is created within your Site it is automatically given a basic filename, e.g. Document1 (if a Word file)

This can be changed easily at any time:

a. Ensure that the file is open in the online version of the application (**not** the preview window)

b. The current filename is displayed at the centre of the band immediately above the Ribbon

c. To change the filename either double click within the filename to select it and rename it, or click within it to obtain an insertion point to modify it
Remember: The Site will automatically save any changes

## 13.   How to open, edit, and work with files collaboratively

Your Office 365 Sites enables you to work collaboratively with others when using Word, PowerPoint, OneNote, and Excel files. This collaborative work can include anyone who has been given permissions to access the Site (which can include non-members of Royal Holloway)

Note:

- To work in this way you need to use the **online** version of the application.
- To be able to work collaboratively on a document/spreadsheet etc. it needs to be saved in the **Office 2013** format e.g. .docx/.xlsx
  If a document/spreadsheet etc. is saved with the older format (office 2010 and earlier) the **Edit in Word** (Excel/PowerPoint/OneNote) **Online** option does **not** display
- A number of people can edit the document (etc.) simultaneously
- You will be able to see where the other person is editing, which e.g. locks the cell in Excel, or the sentence in Word
- Using this facility avoids the problem of files being locked for editing because another user has the file open
- The functionality of the online versions of Word, PowerPoint, OneNote, and Excel is slightly reduced compared to the desktop versions

To open a file in Office 365 Sites

a. Ensure that the **Documents** heading is displaying
b. Click on the file name of the file to be opened
   The file will open in a Preview window

c. To open the file for editing click on **EDIT (DOCUMENT/WORKBOOK etc.)** towards the top-right of the window
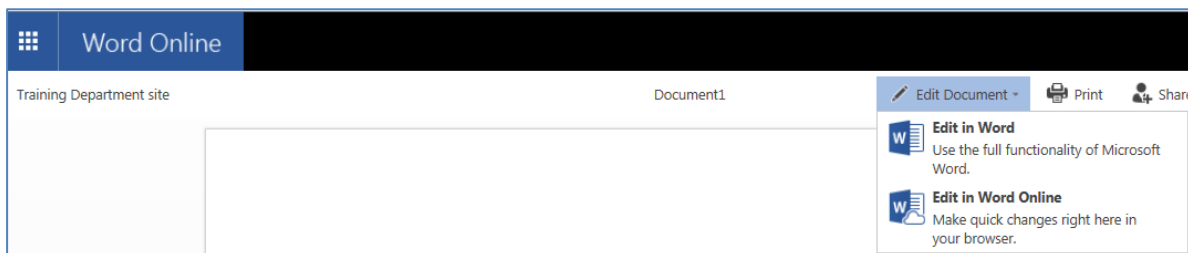
Select **Edit in (Word/PowerPoint/OneNote/Excel)** to open the file in the (full) desktop application
Remember: The desktop applications do not support collaborative working

OR

Select **Edit in Browser** if you want to use the online version and work collaboratively with others who have permissions to edit the file

d. To return to your Site:
   - **If in Preview mode** click on the Site's name at the top-left of the window, just below the top border
   - **If using Word online** click on the Site's name in the border at the top of the window
   - Click on the browser's Back button

14. Identifying who is working on a collaborative document (etc.) – and where

When working collaboratively with other people on a Word document (etc.) the area in which each person is working is colour coded.

The method used to display this varies depending on the application being used:
- Word documents displays a colour-coded flag alongside the text being edited by each person
- Excel and PowerPoint display a colour-coded border
- OneNote lists only the page on which others are working

A list showing the basic e-mail address of each person working on the current document etc. is displayed at the top right of the screen just below the black band. To see the listing click on **other people are here**

15. How to open multiple files within your Site

If needing to open more than one file within your Site (e.g. to Preview the files or use the online application to change them) you need to open each file in its own browser tab:

a. Ensure that the **Documents** heading is displaying
b. **Right-click** on the filename of the first file to be opened

c. Select **Open in Word (or Excel etc.) Online** from the menu that displays to display the file in a separate tab at the top of the browser's window

d. Repeat Steps b. and c. for each additional file you wish to Preview/open
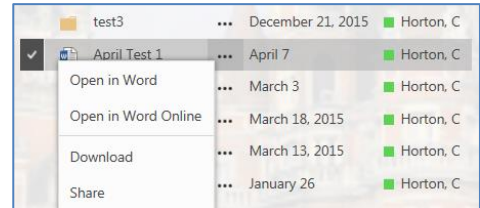
## 16. Using the File Version History

A new version of a file is created each time you close it down

To view the versions available:

a. Ensure that the **Documents** heading is displaying
b. Click on the **ellipses** button (three dots) to the right of the filename
c. Click on the **ellipses** button (three dots) at the bottom of the window that displays

d. Click on **Version History** from the menu that displays
e. The **Version History** window displays showing the versions currently available
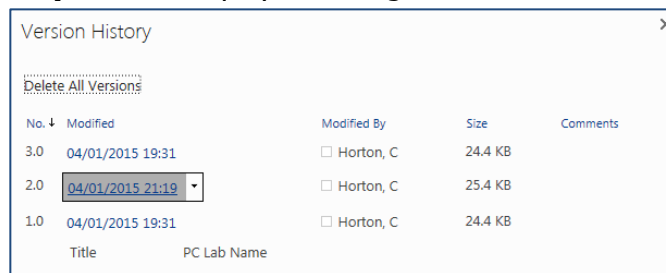
f. To **View** details of the file, **Restore** the version to be the main version, or **Delete** the version, point to the version's date/time. When the down-arrow displays click on it and then click on the option you require
g. Alternatively, to view the document etc. click on the version's date/time
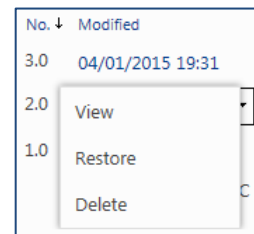
17. Deleting Folders & Files within your Office 365 Site

a. Ensure that the file or folder you wish to delete is displaying
b. Point to the folder or file name so that a check box to the left of the folder/file name displays
c. Click on the check box so that it displays a tick mark
d. Press **[Delete]** on the keyboard

e. When the **Message from webpage** dialogue box displays click **OK** to send the file/folder to the Recycle Bin
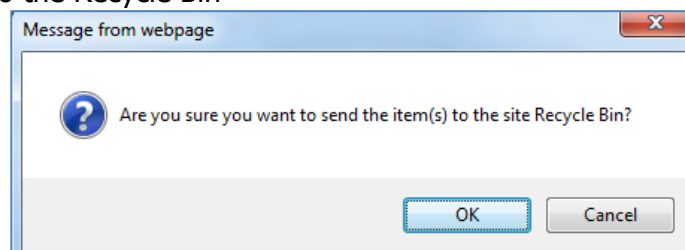
Note: You can also use Windows Explorer to do this, see the Section **Moving and Copying Files using Windows Explorer**

18. Restoring Folders/Files from your Office 365 Site's Recycle Bin

- Your Office 365 Recycle Bin is actually made up of two parts: a First Stage Recycle Bin and a Second Stage Recycle Bin
- When a folder or file is deleted within your Site it is moved to your Site's **First Stage** Recycle Bin
- When the folder or file is deleted from the First Stage Recycle Bin it is moved to the **Second Stage** Recycle Bin (rather than being permanently deleted)
- Files & folders are automatically deleted from **either** Recycle Bins after a **total** of **93 days** of being in one/both Recycle Bins

You should be able to see and restore your own files and folders from the First Stage Recycle Bin. Additionally, depending on the permissions you have, you may be able to:
- See and restore the files and folders of others from the First Stage Recycle Bin
- See and restore the files and folders from the Second stage Recycle Bin

Accessing the Recycle Bin
a. Ensure you are viewing the Site whose Recycle Bin you wish to access
b. Click on **Recycle Bin** in the left-hand menu

OR

a. Ensure you are viewing the Site whose Recycle Bin you wish to access
b. Click on the **Settings** button (cog) at the top-right of the screen to display the **Settings** menu
c. Click on **Site contents**
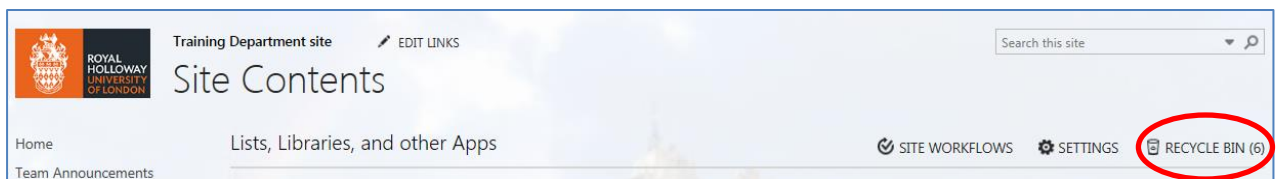
d. Click on **RECYCLE BIN** towards the top-right of the screen

Restoring Folders and/or files from the Recycle Bin
a. Ensure you are viewing the Recycle Bin from which the folder/file is to be restored
b. Click on the check box to the left of the folder(s) and/or file(s) to be restored so that it/they displays a tick mark
c. Click on **Restore Selection** above the check boxes to restore the checked items to their original location
    Note: If a file is restored that was originally in a folder that has now been deleted, the file will be restored into a re-created version of the folder

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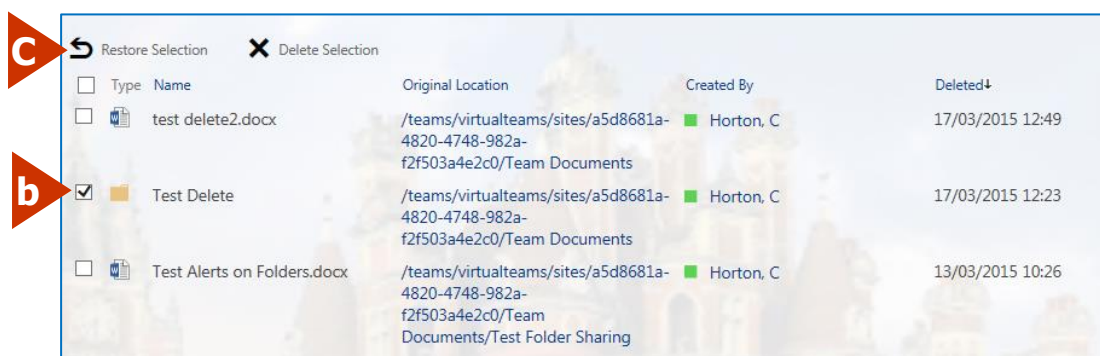
d. If you cannot see the folder/files you are looking for they may be in the **Second Stage Recycle Bin**
    If there are files or folders in this, and you have permissions to access it you will see a link offering you to **Check the second stage recycle bin**
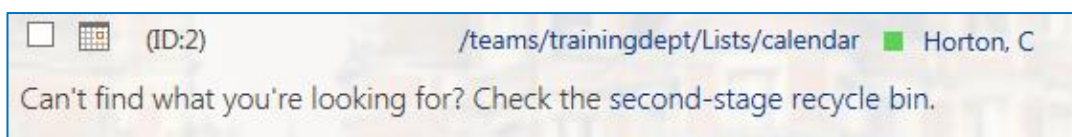
e. By clicking on this link you can view any files and folders that have been move to the Second Stage Recycle Bin. You can then use the above steps to restore them

19. Using Alert Me to e-mail you when Folders or Files are changed

The Alert Me facility (Alerts) enables you to be notified when changes have been made to a folder or file.

This will send you an e-mail whenever a change has been made to a folder, or a file has been opened

Note: If Alert Me is applied to a folder, an e-mail will be sent when any file within it is changed, or a file added or deleted

a. Ensure that the **Documents** heading is displaying towards the top of the screen
b. Also ensure that the folder name or file name to which the Alert Me feature is to be applied is displaying
c. Point to the folder or file name so that a check box to the left of the folder/file name displays
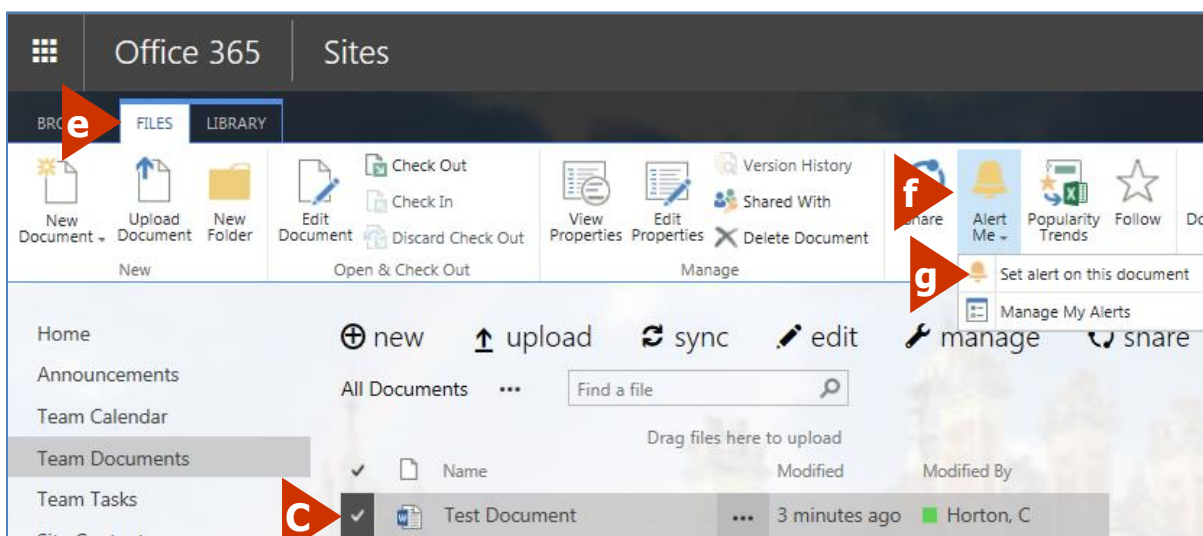
d. Click on the check box so that it displays a tick mark
e. Click on the **Files** tab towards the top left of the screen to display the **Ribbon** at the top of the screen
f. Click on **Alert Me** in the **Share & Track** group towards the centre of the **Ribbon**
g. Click on **Set alert on this document** from the menu that displays

h. The **New Alert** dialogue box that displays enables you to:
i.   Change the e-mail address to which the Alert is sent (or enter a mobile number to send a Text Message instead)
    ii.   Specify what changes will cause the Alert to be sent
    iii. Select how often the Alerts will be sent
    i.   When the settings are as you want click **OK** to close the dialogue box and enable the Alert Me feature

j. You will receive an e-mail confirming that the setup has been successful
    Note: To set up Alert Me for a **Library**, ensure the Library is displaying then follow the above instructions from **Step e.**, ensuring that the **Library** tab is selected

## 20. Checking and/or Removing Alerts from Folders and Files

a. Ensure that the **Documents** heading is displaying towards the top of the screen
b. Click on the **Files** tab towards the top left of the screen to display the **Ribbon** at the top of the screen
c. Click on **Alert Me** in the **Share & Track** group towards the centre of the **Ribbon**
d. Click on **Manage My Alerts**
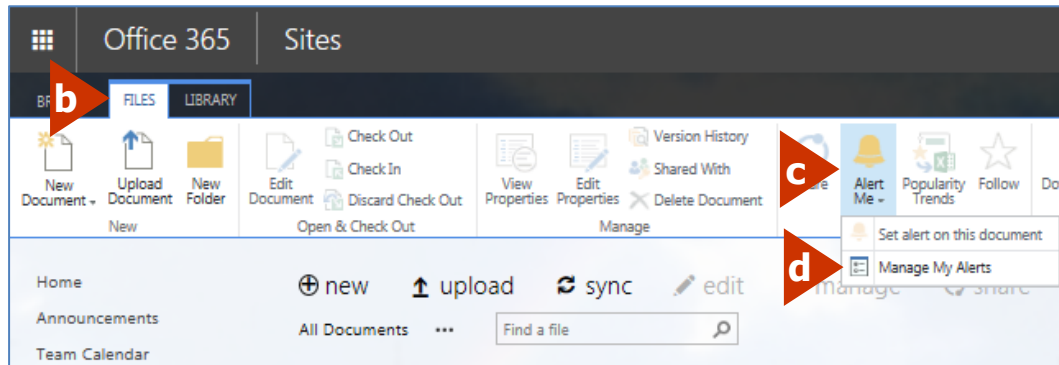
e. The **My Alerts on this Site** page displays showing all of the folders and files on which Alerts have been applied

To Remove an Alert from a Folder or File

a. Ensure that the **My Alerts on this Site** page is displaying
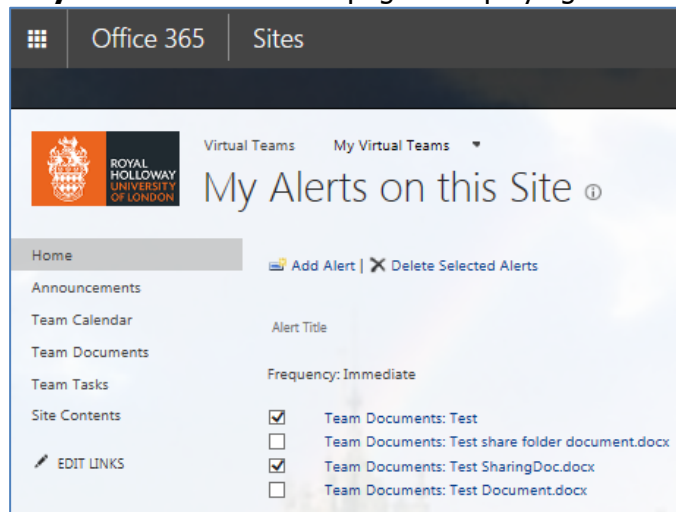
b. Click on the check box to the left of each folder or file whose Alert you wish to remove so that a tick mark display within the box(es)
c. Click on **Delete Selected Alerts** below the **My Alerts on this Site** heading
d. When the **Message from webpage** dialogue box displays click on **OK** to confirm the removal of the Alerts
e. Click on **Home** in the left-hand menu to return to the Sites homepage
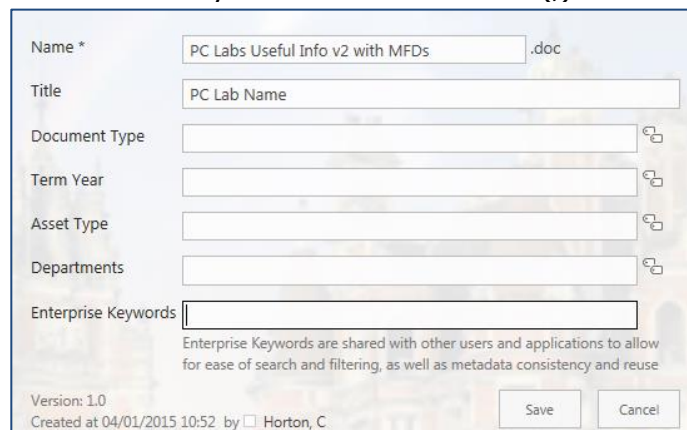
21. Adding Keywords to a File

Although the Office 365 Sites search facility is considered to be very powerful, you can enhance the probability of it locating particular files by manually entering keywords which specifically describe the file:

a. Ensure you can see the **Documents** heading and the file you wish to add keywords to
b. Click on the **ellipses** button (three dots) to the right of the file's filename
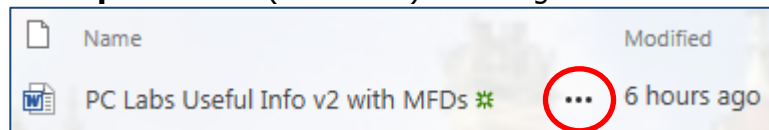
c. Then click on the **ellipses** button (three dots) at the bottom of the window that displays
d. From the menu that displays select **Properties**
e. In the **Enterprise Keywords** panel enter the keywords that you wish to add to enhance the search facility
Note: Separate different keywords with a semicolon (;)

f. Click **Save** to save the changes

22. Using the Office 365 Sites Search Facility

The Sites Search facility, located at the top-right of the window, offers a significant search facility to help you locate the resources you need from your Site.
This is especially powerful if you add targeted keywords (see the Section **Adding Keywords to a File**)

It should be noted that when using the Search facility on your **Homepage** it will search across **all** Sites you have access to
In contrast, when using the Search facility **within** a Site (e.g. your Department Site) it will search within 'that' Site **only**

23. How to Share Your Site

Sharing a Site includes all the Site's components e.g. Documents, Calendar, etc.
You can share a Site with:

- All Royal Holloway staff
- External users who have an Office 365 organisation, Hotmail.com, Outlook.com, or Microsoft Account (https://signup.live.com/signup.aspx?lic=1)
  Note: External users receive an e-mail that contains a link to the Site that they use to access it
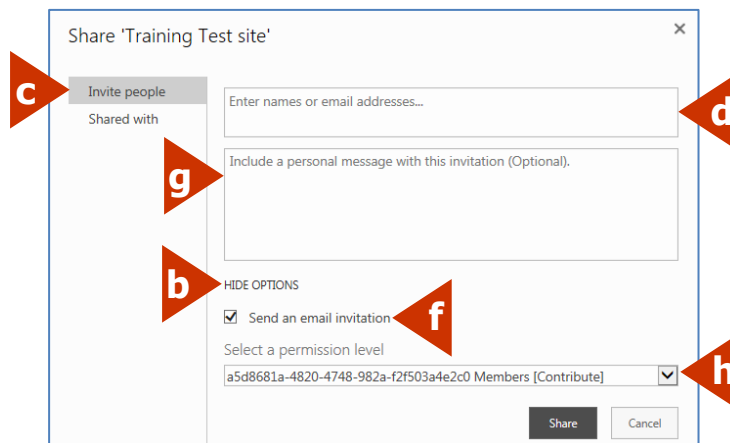 This link will expire after 7 days if they have not clicked on it within that time

To Share an Office 365 Site

a. Ensure that the Site you wish to share is displaying
b. Click **SHARE** at the top-right of the window
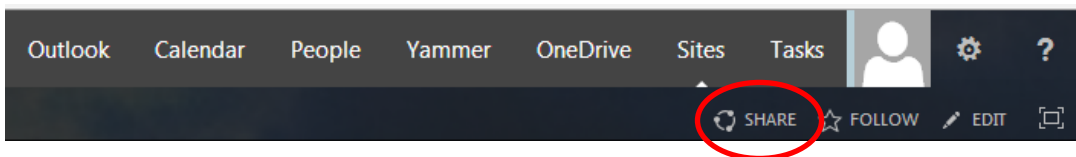
c. Ensure **Invite people** is selected in the left-hand panel

d. In the top text box:
   If you are giving access to members of the College:
   enter their complete College e-mail address **or** family name
   Then from the list that displays below the text box select the person for whom the permissions are to be set so that their correct details display in the text box

   If you are giving access to non-members of the College:
   Accurately enter the person's e-mail address

e. If **SHOW OPTIONS** (rather than HIDE OPTIONS) displays below the lower text box click on it to display several additional options below it
f. If an e-mail is to be sent to those receiving permissions ensure the **Send an email invitation** check box displays a tick mark
g. If an e-mail is to be sent, in the lower text box enter a suitable e-mail message
   Note: Sending an e-mail is especially important for external users, as it is how they receive the link to the Site

h. Below the **Select a permission level** heading, click on the down-arrow to the right of the panel to display a list of permission levels available

i. Then select the permission level the user is to have from the list that displays:

Owners (Full Control):	• Can set permissions for any other user, including to make them an Owner • Create, modify, and view any content within the Site • Can change the Site's appearance, including adding libraries and apps
Members (Contribute):	Can Create, modify, and view ANY content within the Site They can also give Member and Visitor level permissions (but not Owner level)
Visitors (Read):	Can view but not change any content within the Site Visitors are unable to change the permission level for any Site content

j. Click **Share** to instigate the share permissions

24. How to Share a Folder or File from your Site

Note: When sharing a *folder* **everything** in the folder is set to be shared

a. Ensure you can see the **Documents** heading and the file or folder name whose permissions are to be changed
b. Point to the file or folder name so that a tick mark displays to its left
c. Click on the tick mark so that it the file or folder is selected
d. Click on the **ellipses** button (three dots) at the right of the folder or file name
e. Click **SHARE** at the bottom of the dialogue box that displays
f. In the **Share**… dialogue box that displays, ensure **Invite people** is selected in the left-hand panel
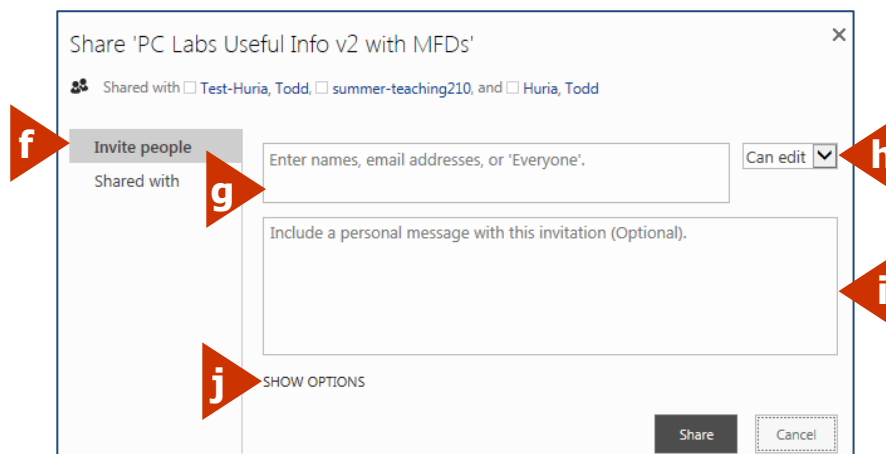
g. In the top text box:
If you are giving access to members of the College:
enter their complete College e-mail address **or** family name
Then from the list that displays below the text box select the person for whom the permissions are to be set so that their correct details display in the text box

If you are giving access to non-members of the College:
Accurately enter the person's e-mail address

h. Click on the down-arrow to the right of the names text box
i. Select **Can edit** or **Can view** as appropriate to set the user's share permissions

j. If **SHOW OPTIONS** displays below the lower text box click on it to display the send email option
k. If an e-mail is to be sent to those receiving permissions ensure the **Send an email invitation** check box displays a tick mark

l. If an e-mail is to be sent, in the lower text box enter a suitable e-mail message
Note: Sending an e-mail is especially important for external users, as it is how they receive the link to the Site. Also, this link expires after 7 days if they have not clicked on it within that time

m. Click **Share** to instigate the share permissions
In addition to receiving the e-mail (if sent), members of College will have a link to the document added to the **Shared with me** folder on their **OneDrive**
Note: For details of how external people access shared folders and files see the Section: **How Externals access a Shared element of an Office 365 Site**

25. How Externals access a Shared element of an Office 365 Site

External users (i.e. non-members of Royal Holloway) that you share your Site, folders, or files with will be unable to access these using: mail.rhul.ac.uk. Therefore:

- They will need to use the link contained within the e-mail that is created as part of setting up the Sharing
Remember: This link will expire after 7 days if they have not clicked on it within that time
- To be able to use this link they will need a Microsoft e-mail account (Outlook.com/Hotmail.com), or a Microsoft Account to which they can associate an existing Outlook.com, Yahoo! or Gmail e-mail account
To set up a Microsoft Account they need to visit:
https://signup.live.com/signup.aspx?lic=1

If it is the *Site* that has been shared with them:
- It will appear exactly the same as you see it

If it is a *folder* that has been shared with them:
- They will see (and have access to) a listing of the files contained within the folder
- They will not be able to see the folder or any other part of the Site
- If the Sharing option was set to **Can edit** they will be able to open, and save, the files using both the online and full application (e.g. Word)
- If the Sharing option was set to **Can view** they will be able to only Preview the files within the Site, or open the files using the desktop application (e.g. Word) where they will have to save any changes outside of the Site

If it is a *file* that has been shared with them:
- This will open directly in the Preview window
- If the Sharing option was set to **Can edit** they will be able save the file using both the Online and desktop application (e.g. Word)
- If the Sharing option was set to **Can view** they will be able to use **only** the desktop application (e.g. Word) where they will have to save any changes outside of the Site

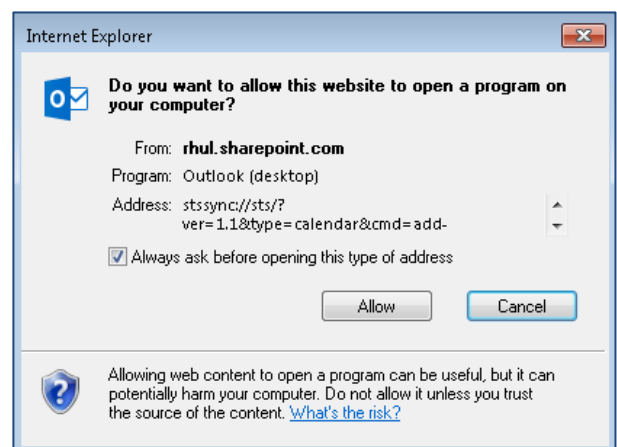## 26. Accessing your Office 365 Site's Calendar in Outlook

Your Site's Calendar can be set so that it displays with your other Calendars in Outlook, enabling you to view and edit the Calendar even when you are not viewing your Site. When doing this the Calendar appears under **Other Calendars** within your Calendar folders

To enable this:

a. Ensure that your Site's Calendar is displaying

b. Click on the **Calendar** tab at the top-left of the window

c. Click on **Connect to Outlook** in the **Connect & Export** group towards the centre of the **Ribbon**
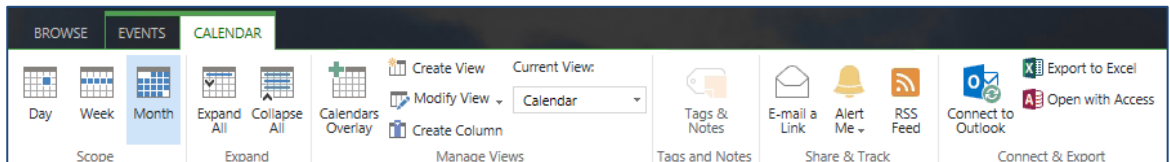
d. When prompted to confirm that you want to allow the website to open a program on your computer, click **Allow**

e. When prompted to confirm that you want to connect the Site's calendar to Outlook, click **Allow**

f. When you next view your Outlook Calendars the **Microsoft Outlook** dialogue box displays asking if you wish to **Connect this SharePoint Calendar to Outlook?**
Click **Yes** if you do wish the Site's Calendar to display with the other Calendars you have access to within Outlook

g. The Site's Calendar will then display under the **Other Calendars** heading

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