

Research Office – SharePoint On-line Training



Workshop Agenda

- Session objectives
- What is SharePoint On-line?
- Initial Set Up
- Basic Functionality
- Next Steps



Session Objectives

- To understand how SharePoint Online will replace Outlook Public Folders
- To gain an overview of how SharePoint Online will be used by the team



What is SharePoint On-line?

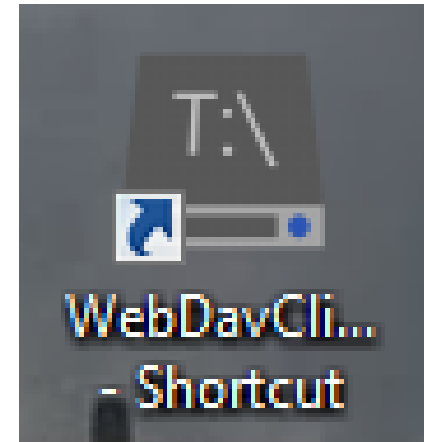
- Cloud-based, available as part of Microsoft 365 agreement
- Platform for document management and sharing
- Phase 1 – replaces the current Outlook Public Folders functionality



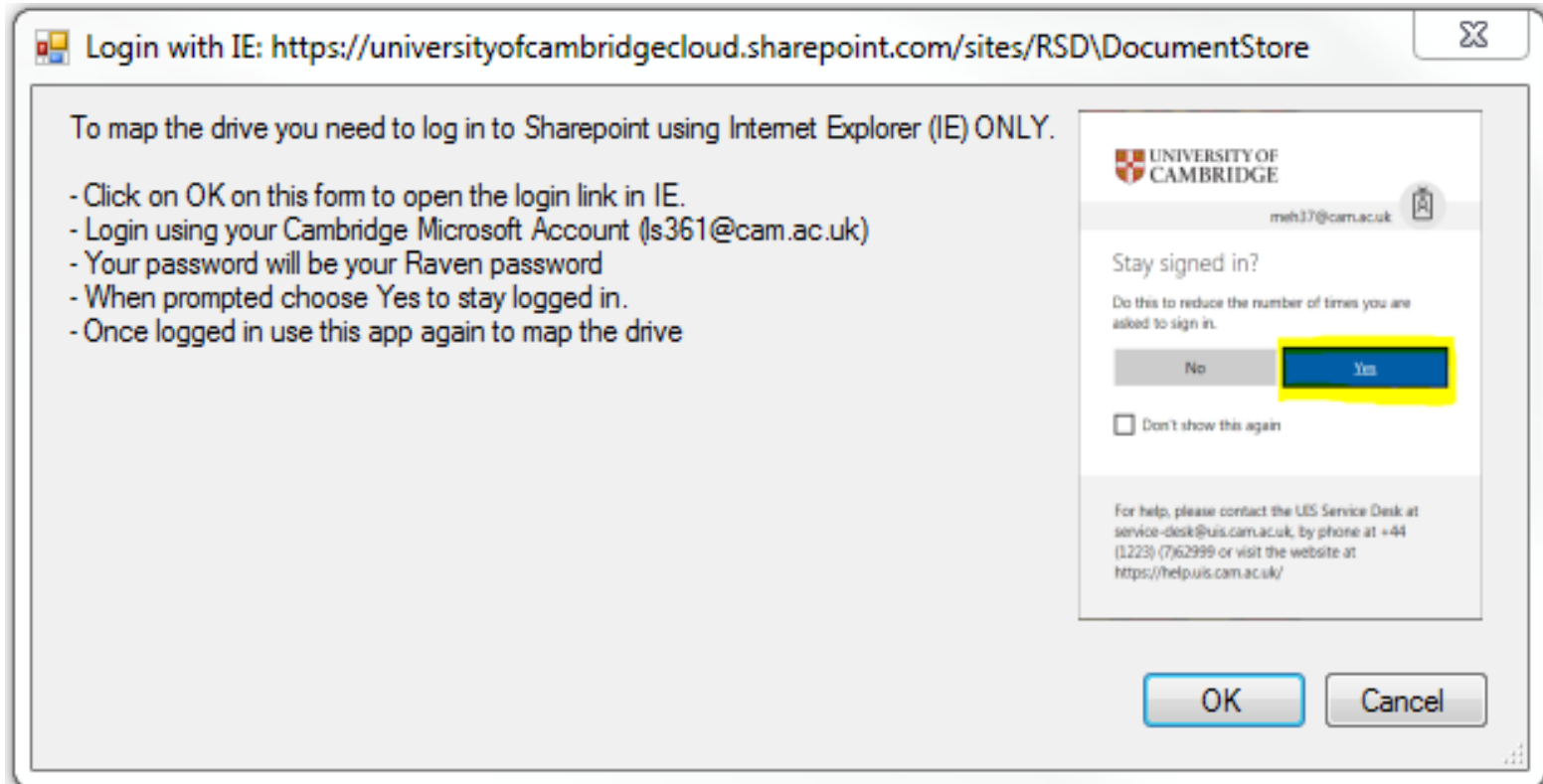
Initial Set Up

Initial Set Up

- Desktop icon
- Enables ability to drag and drop from e-mail to SharePoint
- Only need to do once



Initial Set Up



Read instructions then click OK

Initial Set Up

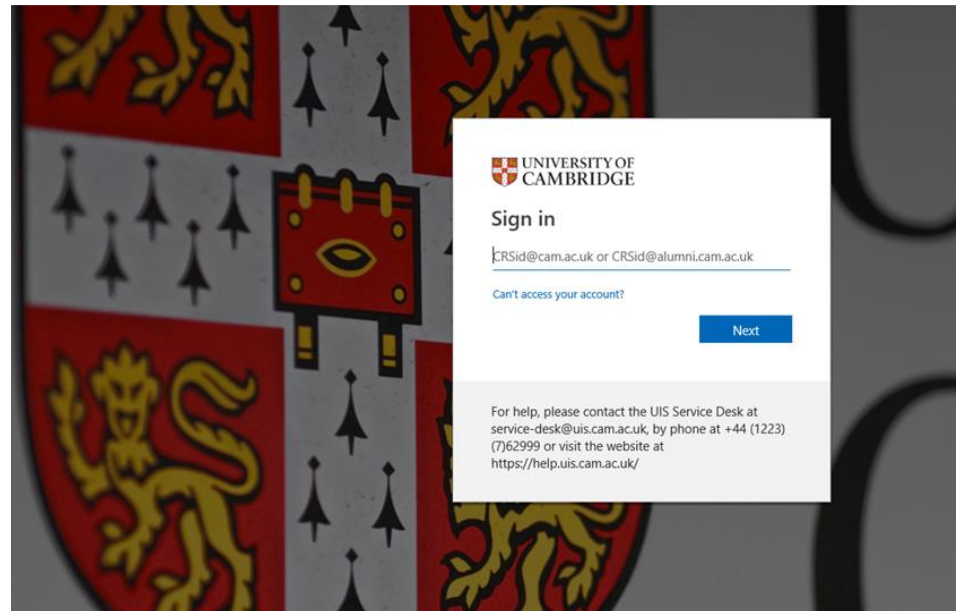
- Message will appear – DO NOT click OK at this stage!



- An Internet Explorer site will also be launched

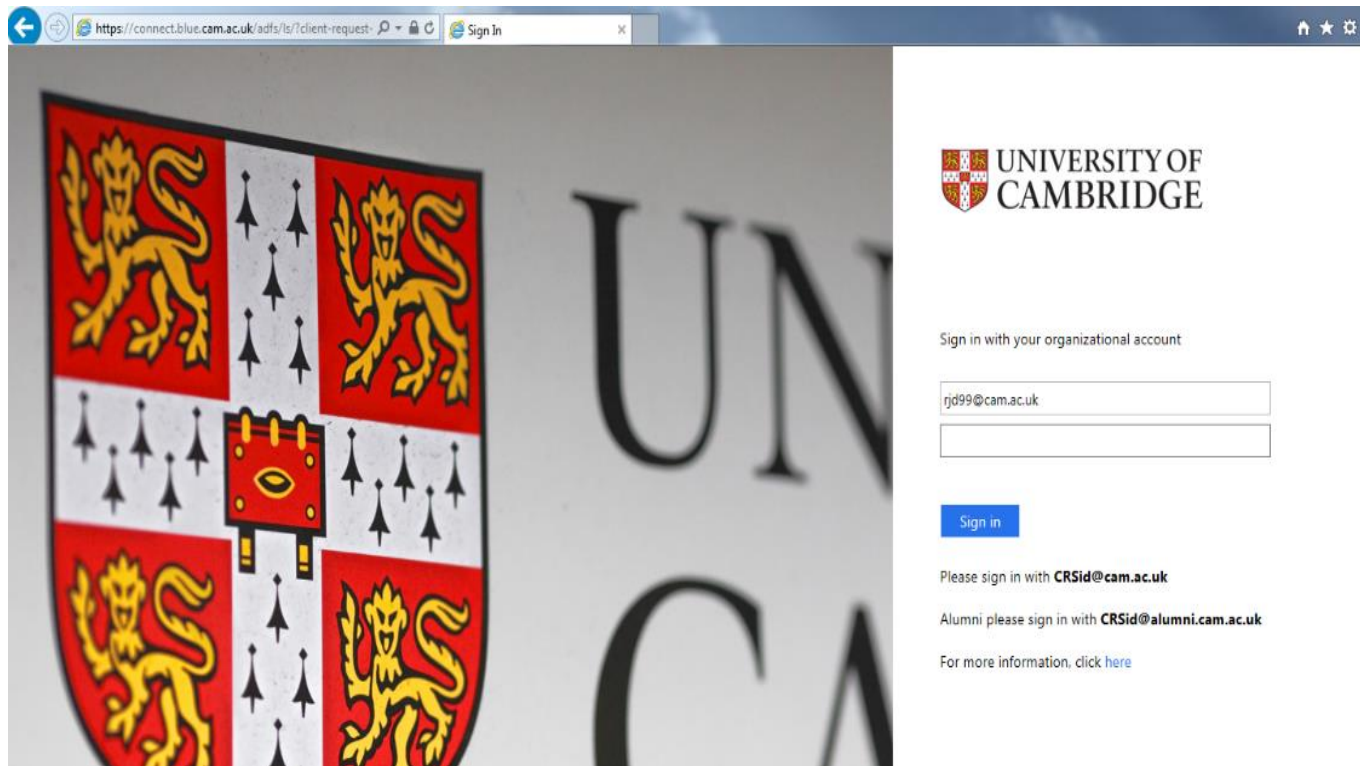
Initial Set Up

- You will be asked to enter your log in credentials
- Format crsid@cam.ac.uk



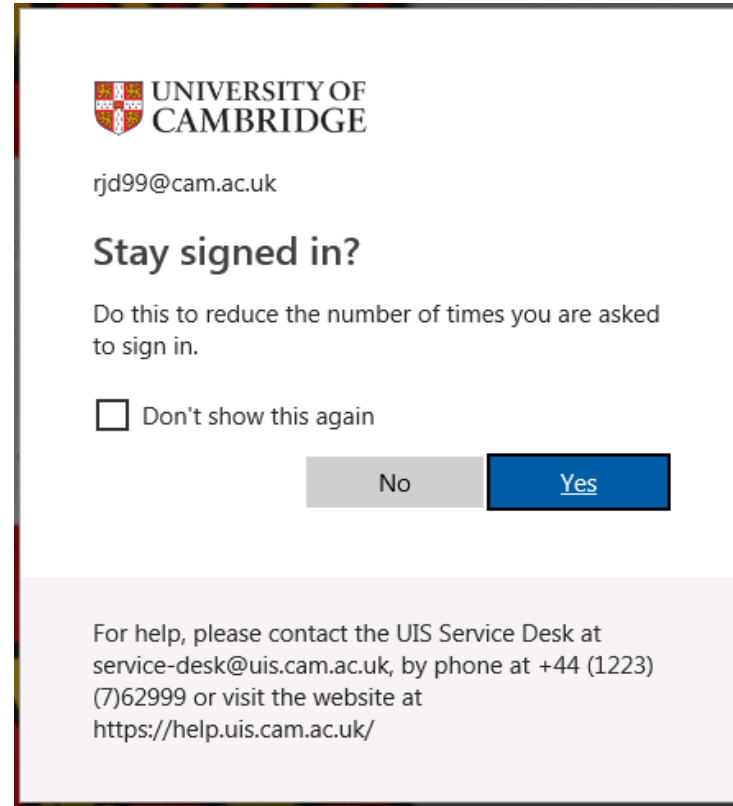
Initial Set Up

- Now enter your UIS Credentials (Raven)




Initial Set Up

- Click Yes to stay signed in



The screenshot shows a dialog box with the University of Cambridge logo and name at the top. Below the logo is the email address 'rjd99@cam.ac.uk'. The main heading is 'Stay signed in?'. The text below asks the user to click 'Yes' to reduce the number of times they are asked to sign in. There is a checkbox labeled 'Don't show this again' which is currently unchecked. At the bottom right, there are two buttons: a grey 'No' button and a blue 'Yes' button. At the bottom of the dialog, there is a light grey box containing contact information for the UIS Service Desk.

 UNIVERSITY OF
CAMBRIDGE

rjd99@cam.ac.uk

Stay signed in?

Do this to reduce the number of times you are asked to sign in.

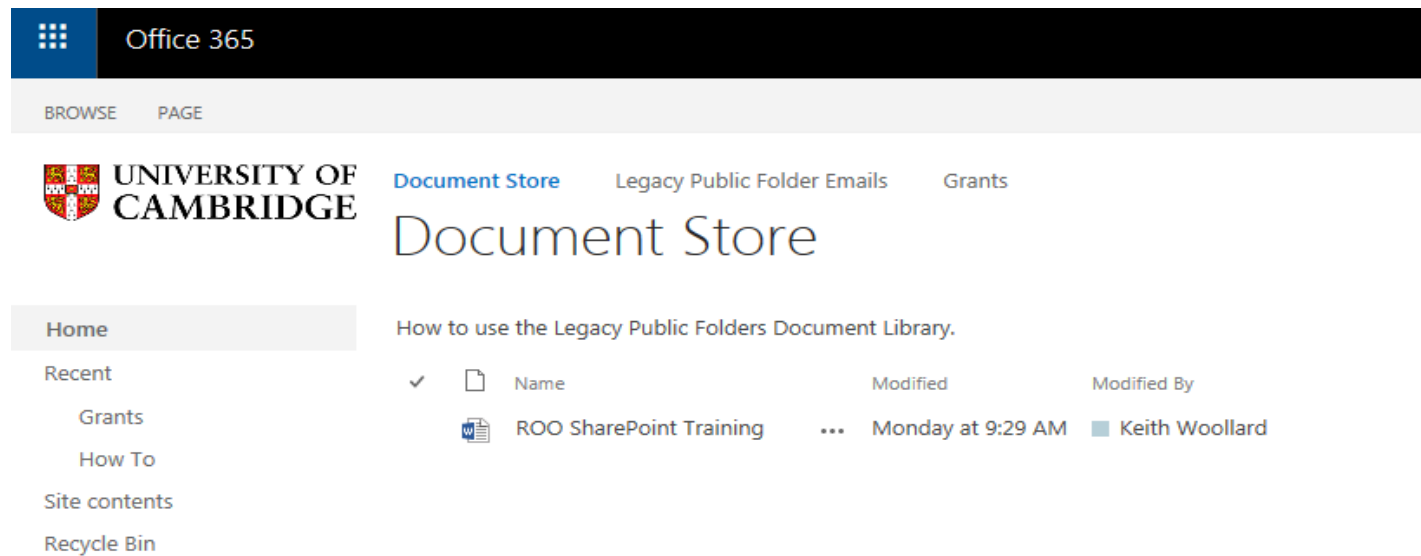
Don't show this again

No Yes

For help, please contact the UIS Service Desk at service-desk@uis.cam.ac.uk, by phone at +44 (1223) (7)62999 or visit the website at <https://help.uis.cam.ac.uk/>

Initial Set Up

- SharePoint session will open up in IE

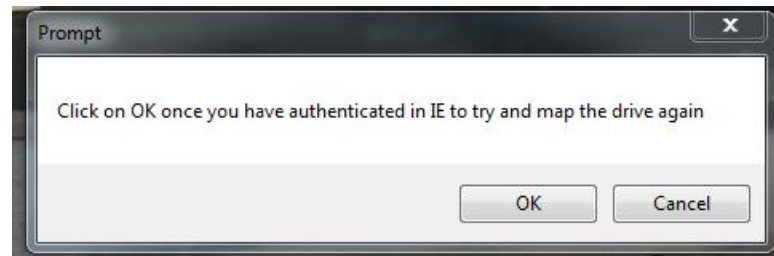


The screenshot displays the Office 365 interface for the University of Cambridge. At the top, a dark blue header contains the Office 365 logo and the text "Office 365". Below this, a light blue navigation bar includes "BROWSE" and "PAGE" options. The main content area features the University of Cambridge crest and name on the left, and navigation links for "Document Store", "Legacy Public Folder Emails", and "Grants" on the right. The "Document Store" title is prominently displayed. A sidebar on the left lists navigation options: "Home", "Recent", "Grants", "How To", "Site contents", and "Recycle Bin". The main content area shows a heading "How to use the Legacy Public Folders Document Library." followed by a table of documents.

✓	📄	Name	Modified	Modified By
	📄	ROO SharePoint Training	Monday at 9:29 AM	Keith Woollard

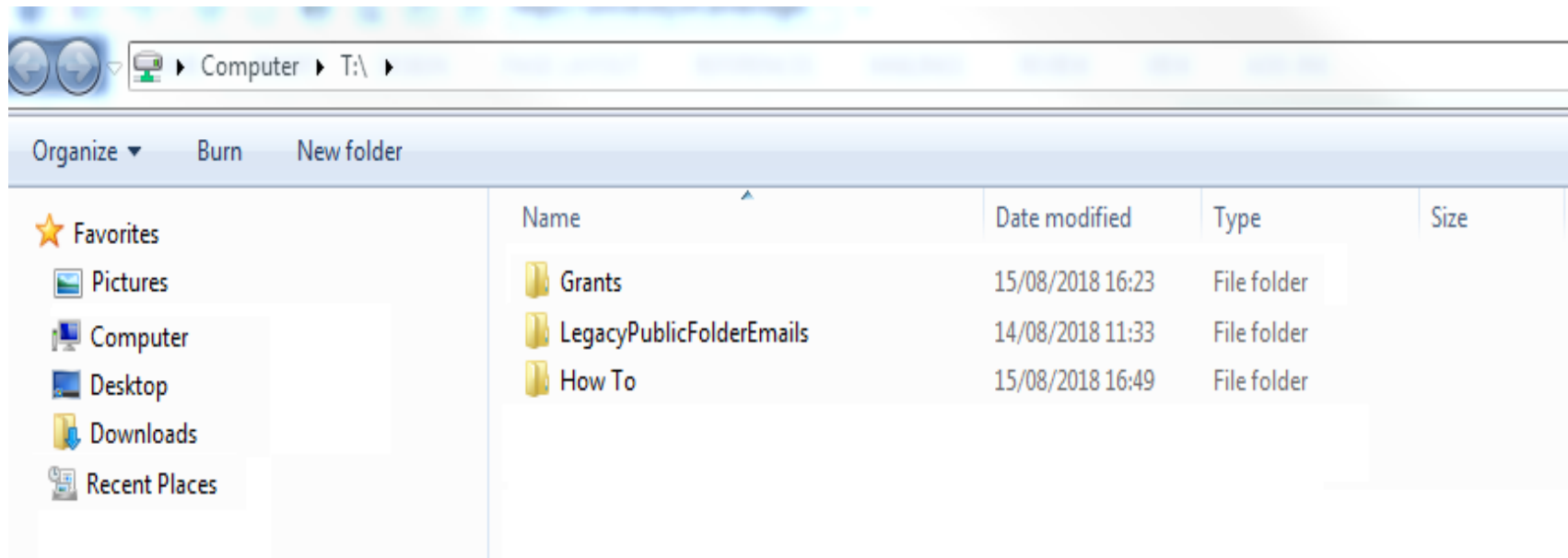
Initial Set Up

- Now click OK
- This message should still be in the active



Initial Set Up

- Windows Explorer Session will open
- Shows SharePoint folders



Saving e-mail to SharePoint

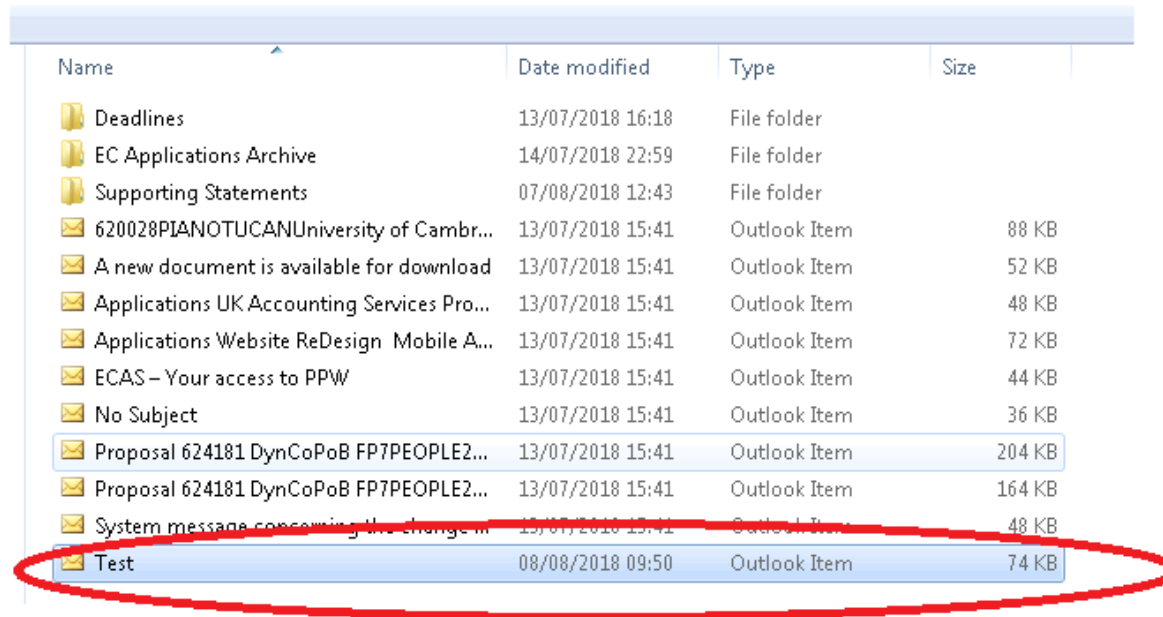
Basic Functionality – Saving E-mail to SharePoint

- Drag e-mail items into the appropriate folder in your mapped SharePoint drive

The image shows two overlapping windows. The left window is Microsoft Outlook, displaying an email from Linda Spinks with the subject 'Test' and the body text 'This is to test the ROO SharePoint Solution'. A red arrow points from the email item in the Outlook list to the right window. The right window is Windows Explorer, showing a mapped SharePoint drive at the path 'cityofcambridgecloud.sharepoint.com@SSL\DavWWWRoot/sites\RSD\Emails (Z:)'. The Explorer window displays a list of folders, including 'Deadlines', 'EC Applications Archive', 'Supporting Statements', and several folders starting with '620028PIANOTUCANUniversity of Cambr...'. A red arrow points from the email in Outlook to the '620028PIANOTUCANUniversity of Cambr...' folder in the Explorer.

Basic Functionality – Saving E-mail to SharePoint

- Windows Explorer View



A screenshot of a Windows Explorer window displaying a list of files and folders. The list is organized into columns: Name, Date modified, Type, and Size. The 'Test' file is highlighted with a red circle.

Name	Date modified	Type	Size
Deadlines	13/07/2018 16:18	File folder	
EC Applications Archive	14/07/2018 22:59	File folder	
Supporting Statements	07/08/2018 12:43	File folder	
620028PIANOTUCANUniversity of Cambr...	13/07/2018 15:41	Outlook Item	88 KB
A new document is available for download	13/07/2018 15:41	Outlook Item	52 KB
Applications UK Accounting Services Pro...	13/07/2018 15:41	Outlook Item	48 KB
Applications Website ReDesign Mobile A...	13/07/2018 15:41	Outlook Item	72 KB
ECAS – Your access to PPW	13/07/2018 15:41	Outlook Item	44 KB
No Subject	13/07/2018 15:41	Outlook Item	36 KB
Proposal 624181 DynCoPoB FP7PEOPLE2...	13/07/2018 15:41	Outlook Item	204 KB
Proposal 624181 DynCoPoB FP7PEOPLE2...	13/07/2018 15:41	Outlook Item	164 KB
System message concerning the change in	13/07/2018 15:41	Outlook Item	48 KB
Test	08/08/2018 09:50	Outlook Item	74 KB

Basic Functionality – Saving E-mail to SharePoint

- SharePoint View

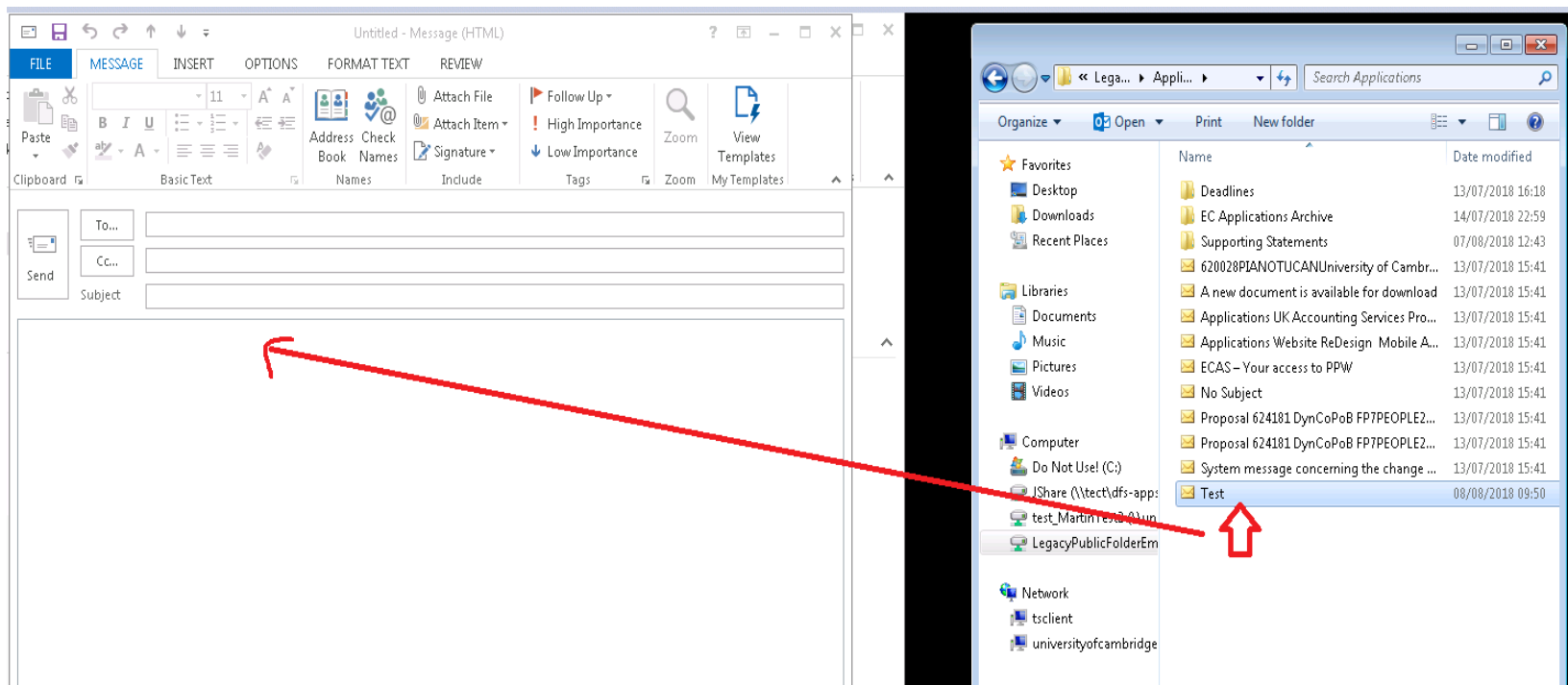
The screenshot shows a SharePoint interface for a library named 'Emails'. The left sidebar contains navigation options: Search, Home, Documents, Site contents, and Recycle bin. The main area displays a list of email attachments under the path 'LegacyPublicFol... > Applications'. The list has columns for Name, Modified, and Modified By. The 'Test.msg' file at the bottom of the list is circled in red.

Name	Modified	Modified By
Deadlines	Yesterday at 12:46 PM	Keith Woollard
EC Applications Archive	Yesterday at 12:47 PM	Keith Woollard
Supporting Statements	Yesterday at 12:47 PM	Keith Woollard
620028PIANOTUCANUniversity...	Yesterday at 12:46 PM	Keith Woollard
A new document is available fo...	Yesterday at 12:46 PM	Keith Woollard
Applications UK Accounting Se...	Yesterday at 12:46 PM	Keith Woollard
Applications Website ReDesign...	Yesterday at 12:46 PM	Keith Woollard
ECAS – Your access to PPW.msg	Yesterday at 12:46 PM	Keith Woollard
No Subject.msg	Yesterday at 12:46 PM	Keith Woollard
Proposal 624181 DynCoPoB FP...	Yesterday at 12:46 PM	Keith Woollard
Proposal 624181 DynCoPoB FP...	Yesterday at 12:46 PM	Keith Woollard
System message concerning th...	Yesterday at 12:46 PM	Keith Woollard
Test.msg	A few seconds ago	Bob Dowling's test accou

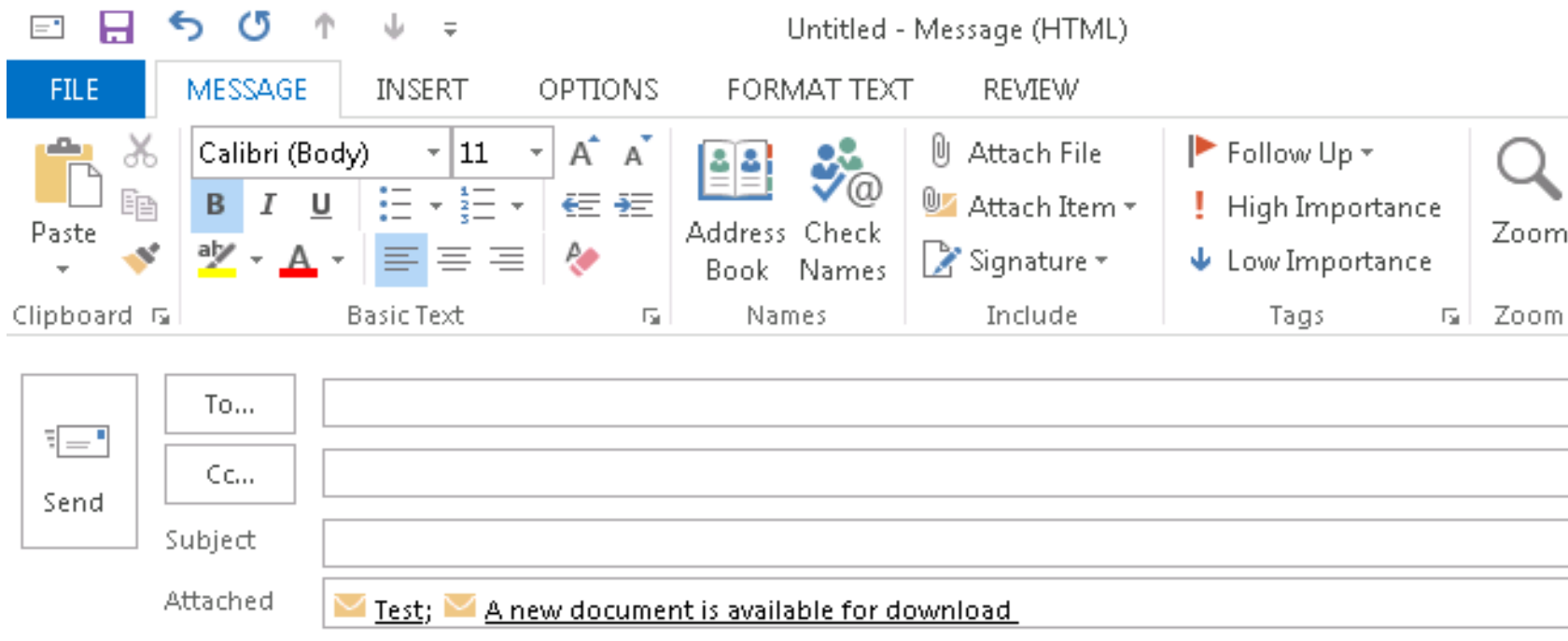
Attaching SharePoint Item to E-mail

Basic Functionality – Attaching SharePoint Items to E-mail

- Drag item from SharePoint to body of e-mail



Basic Functionality – Attaching SharePoint Items to E-mail



The screenshot displays the Microsoft Word interface for creating a new message. The title bar reads "Untitled - Message (HTML)". The ribbon includes "FILE", "MESSAGE", "INSERT", "OPTIONS", "FORMAT TEXT", and "REVIEW". The "MESSAGE" tab is active, showing options for "Clipboard", "Basic Text", "Names", "Include", "Tags", and "Zoom". The "Include" group contains "Attach File", "Attach Item", and "Signature". The "Tags" group includes "Follow Up", "High Importance", and "Low Importance".

Below the ribbon, the message fields are visible:

- To...**: Empty text box
- Cc...**: Empty text box
- Subject**: Empty text box
- Attached**: Contains two items: "Test;" and "A new document is available for download".

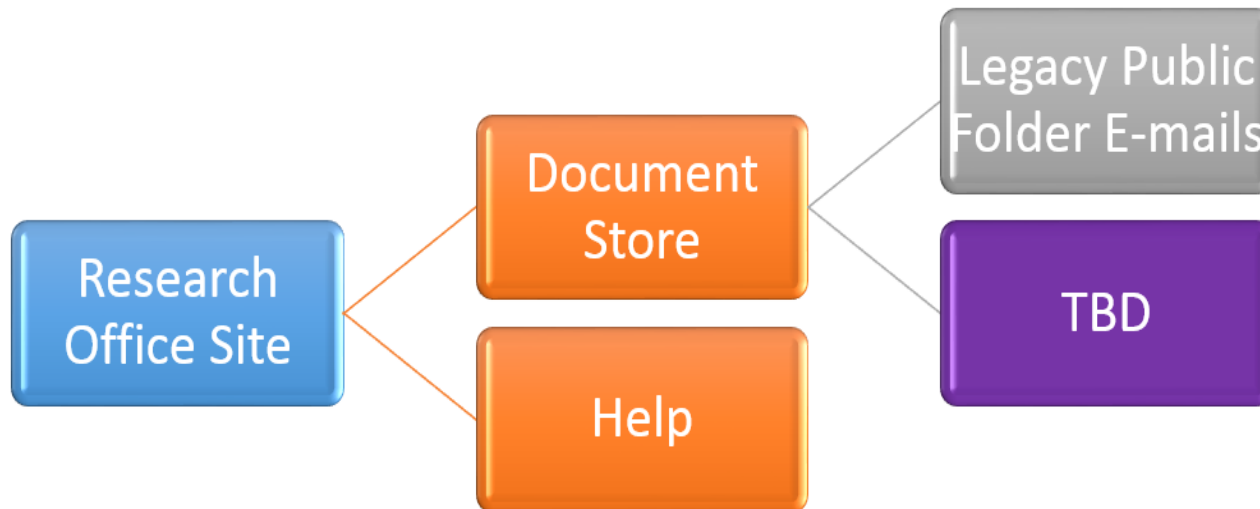
Multiple files can be added in this way

Use of SharePoint

Basic Functionality – SharePoint for ROO

- If only using SharePoint – any browser
- Structure for Day 1 – Legacy Public Folders

ROO SharePoint Structure – Day 1



Basic Functionality – SharePoint for ROO

- To access migrated Public Folder e-mails – click the link at top of page

The screenshot shows the Office 365 interface for the University of Cambridge. At the top, there is a navigation bar with the Office 365 logo and the text 'Office 365'. Below this, there are two tabs: 'BROWSE' and 'PAGE'. The main content area features the University of Cambridge logo and the text 'UNIVERSITY OF CAMBRIDGE'. To the right of the logo, there is a 'Document Store' link, which is circled in red. Below the 'Document Store' link, there is a larger 'Document Store' text with a red arrow pointing upwards to it. To the right of the 'Document Store' link, there is a link for 'Legacy Public Folder Emails', which is also circled in red. Below the 'Legacy Public Folder Emails' link, there is a heading 'How to use the Legacy Public Folders Document Libra'. At the bottom of the screenshot, there is a table with columns for 'Name' and 'Mo'.

Basic Functionality – SharePoint for ROO

- Once up and running:
- [Research Office Document Store](#)

Next Steps

Next Steps

- Public Folder Freeze – 30th August 2018 at 5pm
- SharePoint Online available – 3rd September at 10am
 - All current public folders will be visible in SharePoint

Any Questions

