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

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) 762999 or visit the website at https://help.uis.cam.ac.uk/
Initial Set Up

- SharePoint session will open up in IE
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
### Windows Explorer View

<table>
<thead>
<tr>
<th>Name</th>
<th>Date modified</th>
<th>Type</th>
<th>Size</th>
</tr>
</thead>
<tbody>
<tr>
<td>Deadlines</td>
<td>13/07/2018 15:18</td>
<td>File folder</td>
<td></td>
</tr>
<tr>
<td>EC Applications Archive</td>
<td>14/07/2018 22:59</td>
<td>File folder</td>
<td></td>
</tr>
<tr>
<td>Supporting Statements</td>
<td>07/08/2018 12:43</td>
<td>File folder</td>
<td></td>
</tr>
<tr>
<td>620028PIANOTUCANUniversity of Cambr...</td>
<td>13/07/2018 15:41</td>
<td>Outlook Item</td>
<td>88 KB</td>
</tr>
<tr>
<td>A new document is available for download</td>
<td>13/07/2018 15:41</td>
<td>Outlook Item</td>
<td>52 KB</td>
</tr>
<tr>
<td>Applications UK Accounting Services Pro...</td>
<td>13/07/2018 15:41</td>
<td>Outlook Item</td>
<td>40 KB</td>
</tr>
<tr>
<td>Applications Website ReDesign Mobile A...</td>
<td>13/07/2018 15:41</td>
<td>Outlook Item</td>
<td>72 KB</td>
</tr>
<tr>
<td>ECAS – Your access to PPW</td>
<td>13/07/2018 15:41</td>
<td>Outlook Item</td>
<td>44 KB</td>
</tr>
<tr>
<td>No Subject</td>
<td>13/07/2018 15:41</td>
<td>Outlook Item</td>
<td>36 KB</td>
</tr>
<tr>
<td>Proposal 624181 DynCoPoB FPTPEOPLE2...</td>
<td>13/07/2018 15:41</td>
<td>Outlook Item</td>
<td>204 KB</td>
</tr>
<tr>
<td>Proposal 624181 DynCoPoB FPTPEOPLE2...</td>
<td>13/07/2018 15:41</td>
<td>Outlook Item</td>
<td>164 KB</td>
</tr>
<tr>
<td>System message containing the changelog</td>
<td>13/07/2018 15:41</td>
<td>Outlook Item</td>
<td>48 KB</td>
</tr>
<tr>
<td>Test</td>
<td>08/08/2018 09:56</td>
<td>Outlook Item</td>
<td>74 KB</td>
</tr>
</tbody>
</table>
**Basic Functionality – Saving E-mail to SharePoint**

- **SharePoint View**

<table>
<thead>
<tr>
<th>Name</th>
<th>Modified</th>
<th>Modified By</th>
</tr>
</thead>
<tbody>
<tr>
<td>Deadlines</td>
<td>Yesterday at 12:46 PM</td>
<td>Keith Woolard</td>
</tr>
<tr>
<td>EC Applications Archive</td>
<td>Yesterday at 12:47 PM</td>
<td>Keith Woolard</td>
</tr>
<tr>
<td>Supporting Statements</td>
<td>Yesterday at 12:47 PM</td>
<td>Keith Woolard</td>
</tr>
<tr>
<td>62002BPANOTUCANUniversity...</td>
<td>Yesterday at 12:46 PM</td>
<td>Keith Woolard</td>
</tr>
<tr>
<td>A new document is available 12345</td>
<td>Yesterday at 12:46 PM</td>
<td>Keith Woolard</td>
</tr>
<tr>
<td>Applications UK Accounting Service...</td>
<td>Yesterday at 12:46 PM</td>
<td>Keith Woolard</td>
</tr>
<tr>
<td>Applications Website ReDesign...</td>
<td>Yesterday at 12:46 PM</td>
<td>Keith Woolard</td>
</tr>
<tr>
<td>ICAS – Your access to PPW.msg</td>
<td>Yesterday at 12:46 PM</td>
<td>Keith Woolard</td>
</tr>
<tr>
<td>No Subject.msg</td>
<td>Yesterday at 12:46 PM</td>
<td>Keith Woolard</td>
</tr>
<tr>
<td>Proposal 624181 DynCoPo8 FP...</td>
<td>Yesterday at 12:46 PM</td>
<td>Keith Woolard</td>
</tr>
<tr>
<td>Proposal 624181 DynCoPo8 FP...</td>
<td>Yesterday at 12:46 PM</td>
<td>Keith Woolard</td>
</tr>
<tr>
<td>System message concerning th...</td>
<td>Yesterday at 12:46 PM</td>
<td>Keith Woolard</td>
</tr>
<tr>
<td>Test.msg</td>
<td>A few seconds ago</td>
<td>Bob Dowling's test account</td>
</tr>
</tbody>
</table>
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

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**

- Research Office Site
- Document Store
- Help
- Legacy Public Folder E-mails
- TBD
Basic Functionality – SharePoint for ROO

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