Microsoft

# Setup Guide for SharePoint for Education

# Microsoft in Education

We are partners in learning.

Office 365

# Contents

Microsoft

# An Introduction to Sharepoint 2013 in Office 365 for Education

SharePoint allows you to **connect, collaborate** and **create** with other users and groups in your educational institution. You can set up group work spaces for staff, students and other groups, even down to the level of individual classes and subjects. Different guides in this series will help you to work through many of the parts in more detail.  After using this guide, you will be able to:

- Set up a collaborative team site for a group of users, e.g. your teaching staff
- Grant access to the team site for your selected users
- Understand how to add documents, links and other materials to your team site
- Know where to set up a public facing website for your institution
- Work towards setting up a personal site and your own blog
- Add apps such as discussion forums for groups of users, document libraries, project management tools and team calendars to your SharePoint site.

## 1. Before you start

- You will need to check whether your domain verification has been completed and that you have qualified for the free Office 365 Education A2 plan.
- Complete the licence purchasing as explained in the first guide.
- Upload all your users, either individually or by using the **bulk upload** function.
- Check that all your new users have received their login details and have been able to access Office 365.
- It is usually a good idea if your users log in for the first time in groups where there is help available should they encounter any difficulty. You might want to do this by staff department and by class for students.
- Once this is done, they will be able to explore Office 365 for themselves while you build your site. This guide will take you through how to do that.
- When you have built your institution site, your users can become familiar with it. You can then gradually add other services such as **Email** and **Video Conferencing** to your institution Office 365 platform as they become more confident and advanced users.
- Your users will probably come back to you with lots of ideas on how to use Office 365. You might consider setting up a team to help with planning, training and administration.
- You must have admin permissions in order to create sites. If you do not have admin permission you can only create subsites.

**Microsoft**

## 2. Building your institution site

- Go to your Office 365 **dashboard.** On the top blue toolbar click on **Admin**. This will open a drop-down menu like this:
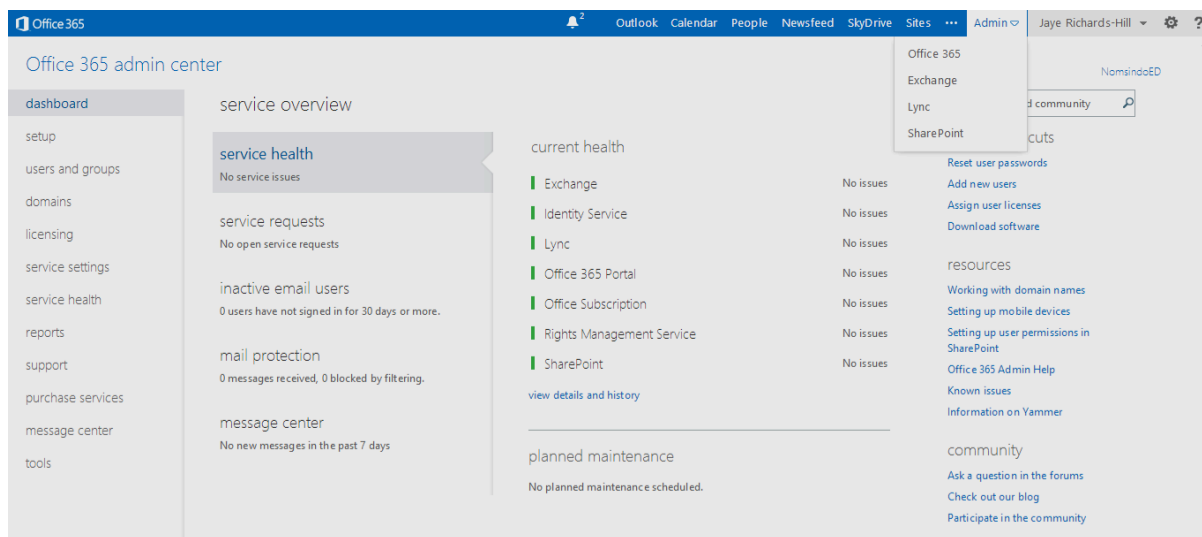


- When you click on **SharePoint** you will see this screen:
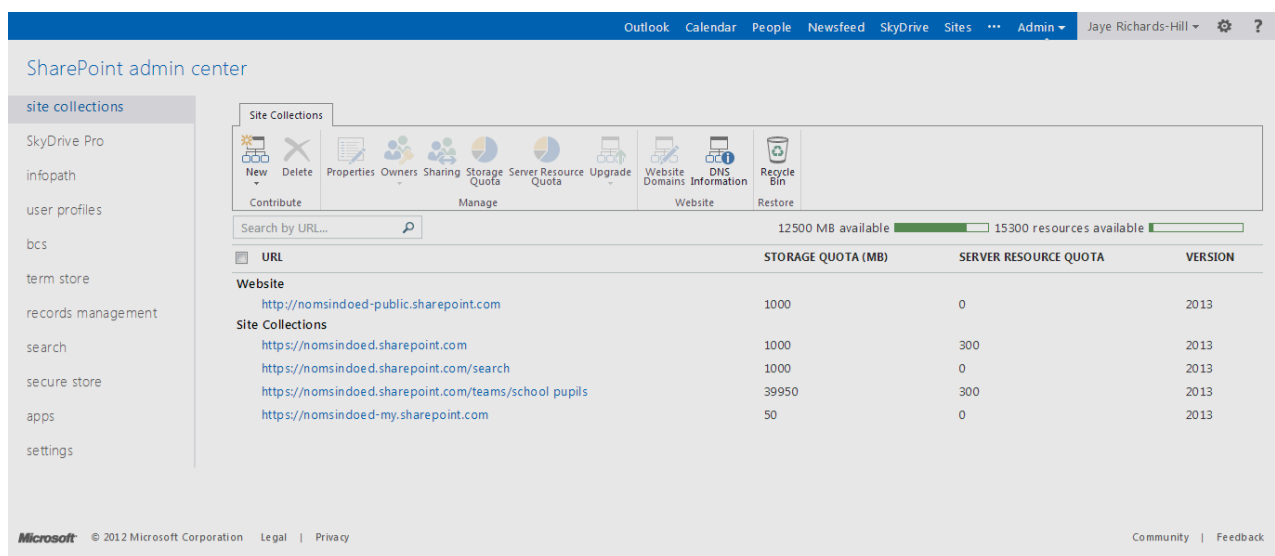


- There are lots of functions or commands that you won't need to use at first. As you become more familiar with your Office 365 platform, you may start to use them.
- You will see in the screen above, there are links to one **Website** and four **Site Collections.**
- The website is open to everybody - both users and others who are not staff or students within your institution. It called **public facing** and this is where you might put information or publicity about your institution that you want anybody to be able to see.

Microsoft

- Click on **Website**. The next screen will open:
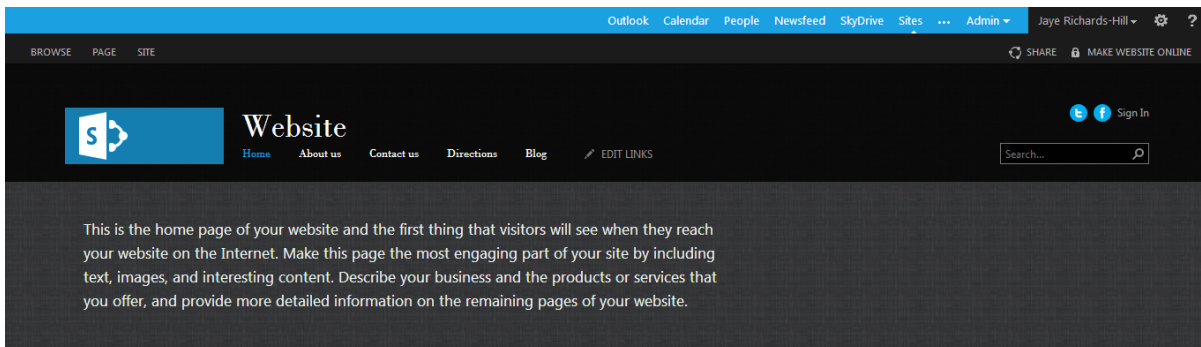


- How to build your institution website will be explained in another guide in this series. For now, explore some of the functions by clicking on the **command buttons**. You will see that it is simply a case of adding text or importing images to the different parts of the website pages.
- Your **Office 365 website** is offline and only visible to your users until you are happy to make it available to anybody. This is called **publishing** it.
- Your website has opened in a new page. Close this down and return to your **SharePoint Admin center** page:
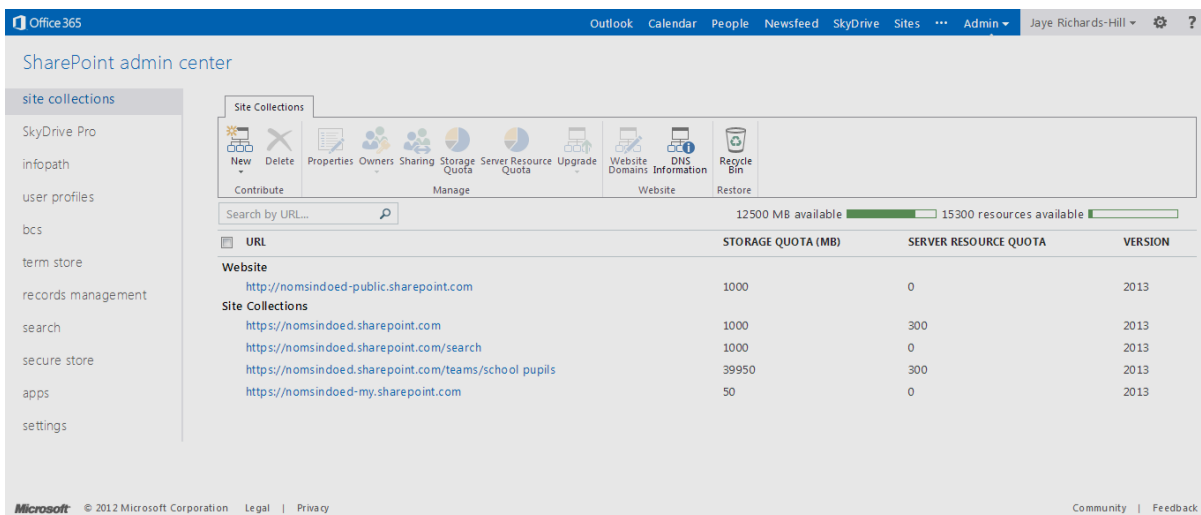


- Below the link to your external website you will see four **sites** in the **Site Collection** that has already been created and suggested as a part of your **Office 365 Education plan**.
- These are suggested sites to use in your institution. There are four different types of site shown here. From top to bottom, these are **Team site, Search page, Student discussion forum** and **Personal site**. You can explore these by clicking on the links and going to each of the **site pages**.
- Separate guides will explain how to use these types of sites.
- The other functions in the menu on the left side of the screen are all administrative functions for **SharePoint**. Don't worry about these at this time. You will discover how and when to use these as you become more familiar with how everything works.
- The other way to create new team sites is simply to go to **Sites** on your top blue toolbar and then click on **+new site**. Simply follow the instructions that appear on the screen to create your new team site.

## 3. Creating new site collections in your institution

- On the **Site Collection toolbar** above your existing site collection, click on **New.** The following screen will open:
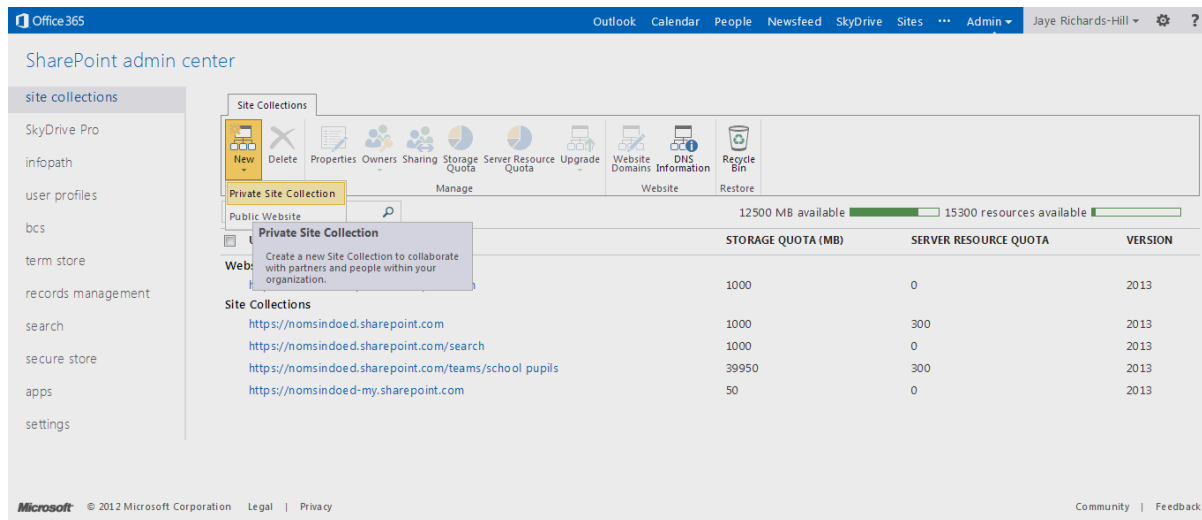


- Click on **Private Site Collection**. You will now see the following screen appear:
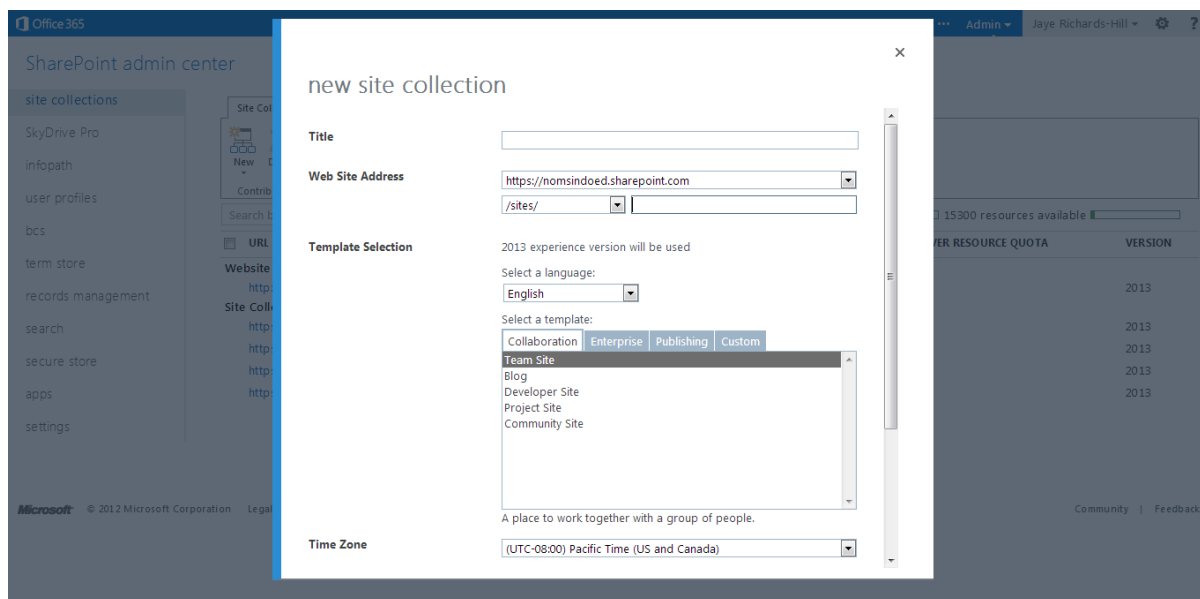


- You will now need to complete a few details and decide which type of **site collection** you'd like to create. This might be a **Team Site collection** for staff or according to subject, department, stage, grade, class, students etc.
- You have five different **Collaboration** type sites to choose from. Click on the options in turn to reveal a description of each type of Collaboration site. You could probably think of possible uses for all of the options. Exploring them will help you become more familiar and confident in using SharePoint. Remember, you can always go back to your admin screen if you get stuck!

Microsoft

- These five options under the Collaboration tab should be enough for most potential uses in your institution. The other tabs (**Enterprise, Publishing** and **Custom**) are for more advanced use.
- We will have a look at the first option, which is a **Team Site,** and go through the steps for setting up a **Teaching Staff Team Site**.
- Enter the name of the site in the Title box. We will use **Teaching Staff** as the name in this example. Enter this in the **Web Site Address** box as well. Change the other part of the web site address to **/teams/.** Your screen will now look like this:
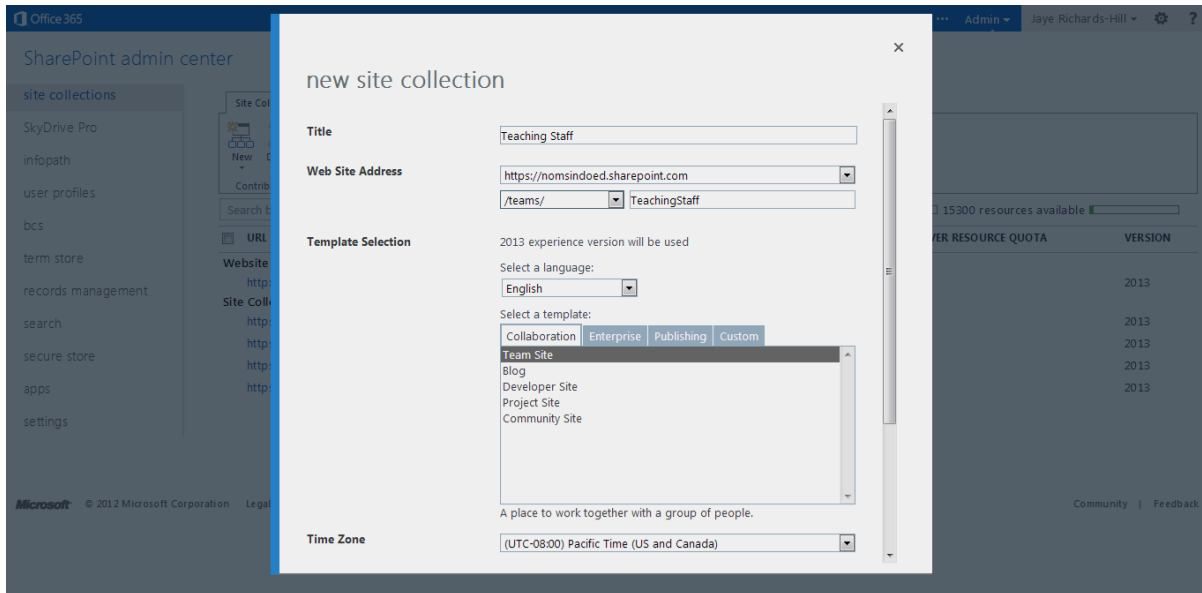


- As you scroll down this window you will need to enter some more details. First, set your time zone by selecting your location from the drop-down menu.
- Next, you need to decide who will be the administrator of the site. Choose the name from the window that appears when you click on the **browse** icon (the square box) to the right of the **Administrator** box. The following screen should load:
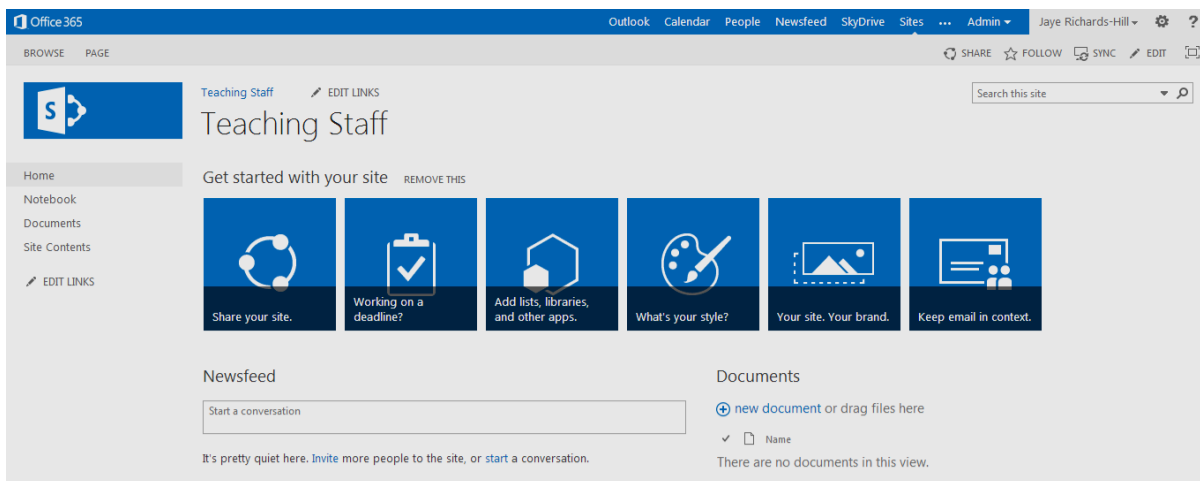
Microsoft
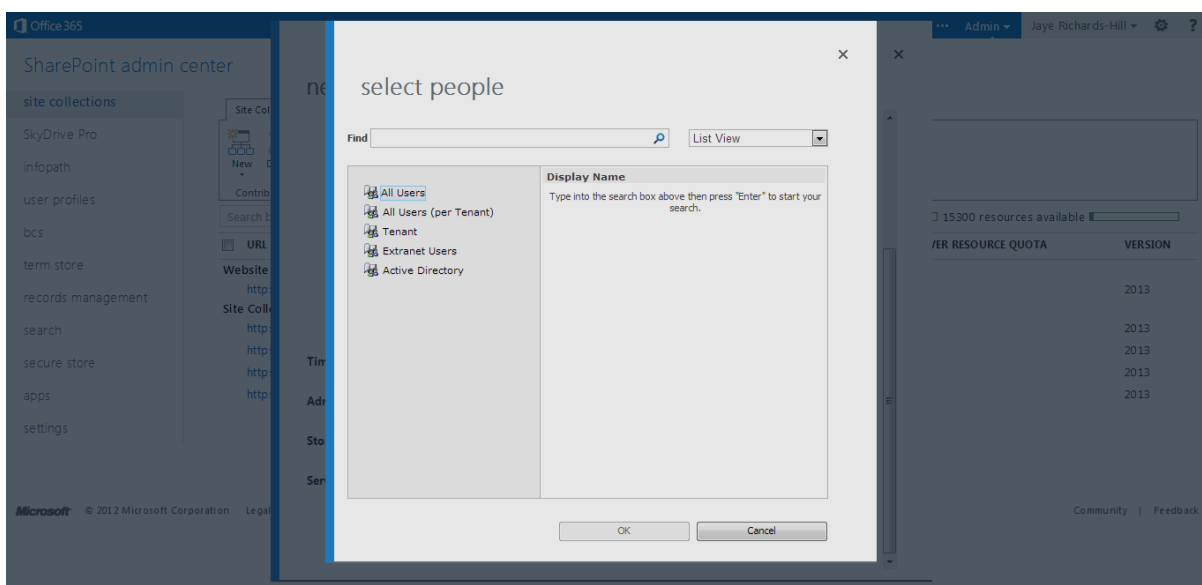
- The easiest way to find people is to click on the **magnifying glass** icon at the end of the **Find** box. This will bring up a list of all of your users. For this **site collection**, find select your own **user name** from the list and click **OK**. Your name will appear in the **Administrator** box on the **New Site Collections** page underneath the **time zone** selection box.

- Next, enter a figure for the **storage quota** for your new site collection. The maximum available amount for your new collection will be displayed next to the box. Enter 1000 MB (1 GB), which is quite a lot of storage space) for now. You can always change it later.

- Click **OK** and your new **site** will now be created for you. You may want to go and make some coffee as it could take ten minutes or so before your **site collection** becomes ready to use.

- It is called a **site collection** because you might choose to construct several **subsites**. This new site page you will be working from is a **parent site** that might have several **subsites**.

- You might decide to construct **subsites** for different grades of teaching staff, subjects or faculties all accessed from the **main site** page. Be aware, however, that the more subsites you have, the more storage space your parent site collection will need.

- You can see that a new **site collection** has been added in the screen here:



- If you select the box next to your new site collection, you will be able to use the functions in the **toolbar** above the **Site Collections** list to change the properties of your new site collection. You can manage the storage capacity, visibility (including people outside of your organisation who you might want to invite into your team) and administrator rights.

Microsoft

- You can now start to work on this new **Team site collection**. Click on the link to open it and your screen will look like this:



- Now have a look at some of the functions in the left-side menu bar.
- **Notebook** is a **Microsoft OneNote team site** for project collaboration. One of the features of Office 365 is the ability to edit **OneNote** and **Excel Spreadsheets** along with other users in real time.  Using **OneNote** will be covered in a later guide.
- **Documents**  is where you are able to add documents for your team to view and download. Click on the link and the following screen will appear:
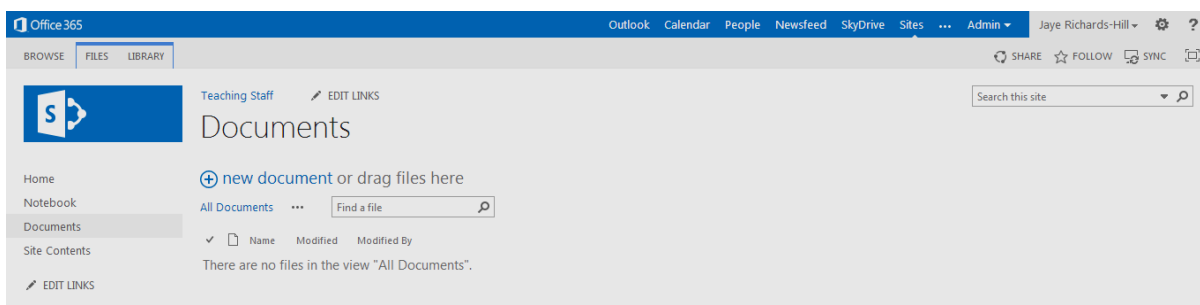


- If you click on **Settings** (the wheel-shaped icon) next to your name, this reveals a drop-down menu giving you all the site administrative functions. Click on **Site Settings** to make any changes to your site master settings.

## 4. Working with Documents

- To upload a new document, click on **+new document** and follow the simple instructions that follow. Your document will appear on the screen when it has been loaded.
- You can also drag and drop documents from your computer or tablet device into this area of your **site collection.**

Microsoft

- The documents will load onto your page and form a **document library** for your team site members. The screen will look like this:
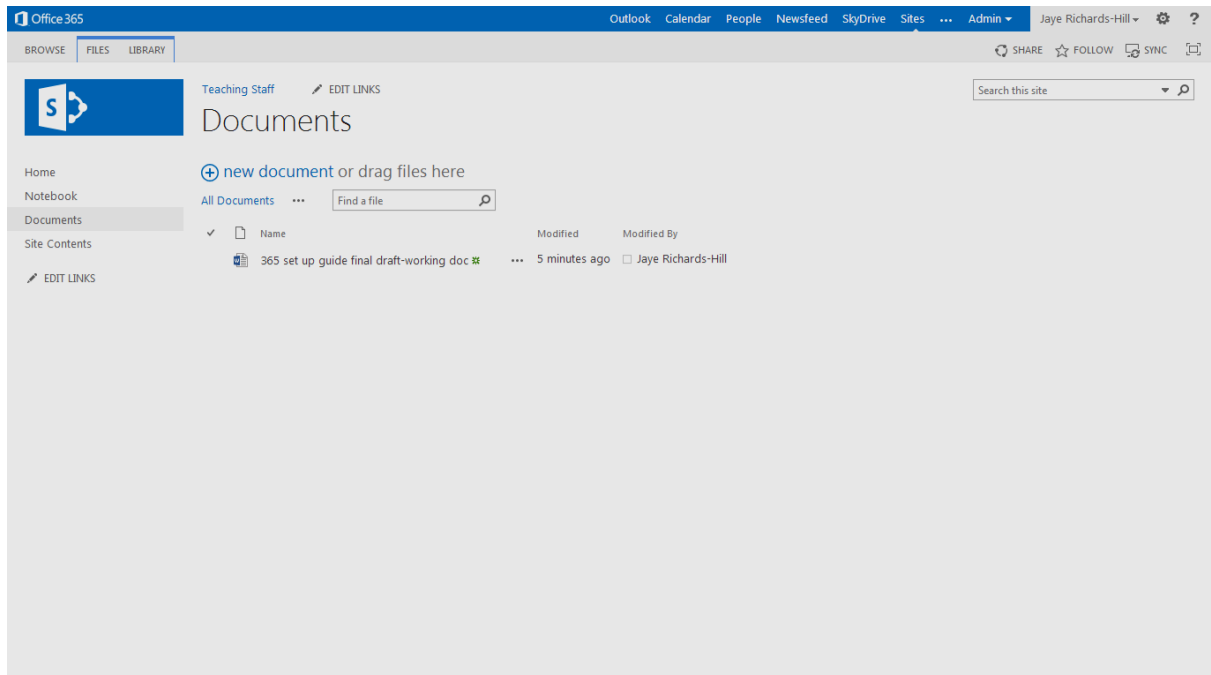


- Clicking on the **Files tab** at the top of the screen will open a further **toolbar** that gives you several functions for use with your documents and your **document library** once you and your team have uploaded a few more files.
- If you hover your **cursor** to the left of a document name, a **tick** will appear. Click on this and your document description will become highlighted. This allows you to use the functions on the top **toolbar.**
- You can open a document and **edit** it. However, if many users are working on a document at the same time, keeping up to date with the latest version can be difficult. SharePoint has a solution to this problem...
- You can **check out** a document to prevent anybody else from working on it while you are reading or editing it.
- When you are ready, you can **check in** the document to make it available to your team members again.
- You can see previous versions of the document by clicking on **Version History.**
- You can **share** a document with team members. This sends them a copy.
- You can set up **alerts** so that you receive an email whenever any changes are made to the document.
- Following a document means that any changes or updates will appear in your own **personal site Newsfeed.**
- There are other functions on this toolbar that you will not need to use until you are a more experienced user.
- There are another four useful functions on the right of the top **toolbar**.
- **Share** allows you to make people members of your team site. You would add all of your institution's teaching staff by following the step by step instructions that appear on the screen.
- **Follow**  creates a shortcut to this page in your site on your own personal site collections page.

Microsoft

- **Sync** creates a copy of your document library on your computer, which updates every time you are online.
- The last of these four functions lets you maximise your **content window**. Click on it and see how it focuses attention on your library contents. Click again to return to the original view.
- Clicking on the **Library** tab at the top left of the screen opens up the **Library toolbar**.
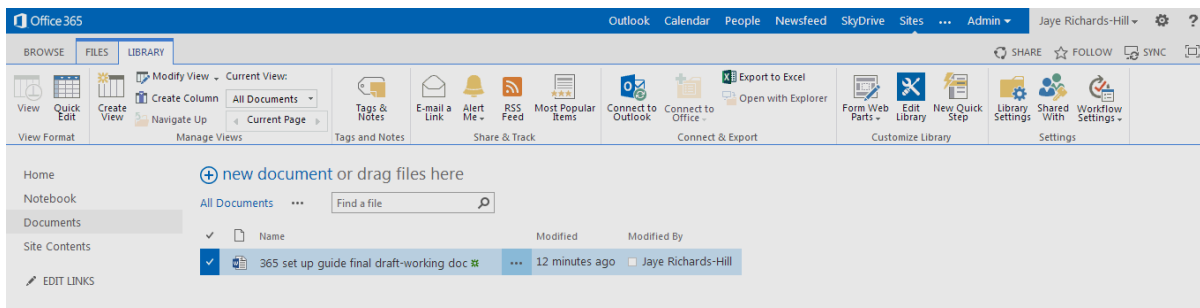


- Many of the commands on this toolbar are similar to those on the Document toolbar. Click on them to explore. Most are to do with the appearance and permissions settings for your library. You will start to use them more as you become confident in working with SharePoint.
- Your **document library** will also appear on the front page of your **team site** in a condensed format.
- Now click the **Home** command on the left menu. This will return you to the **front page** (landing page) of your team site collection.
- The remaining commands on the left side menu are **Site Contents** and **Edit Links.**
- **Site Contents** gives you information about what is in your **site** and about all of the **subsites** in the collection. You can also add **apps** to your site from here. Open **Site Contents** and the screen will look like this:

**Microsoft**
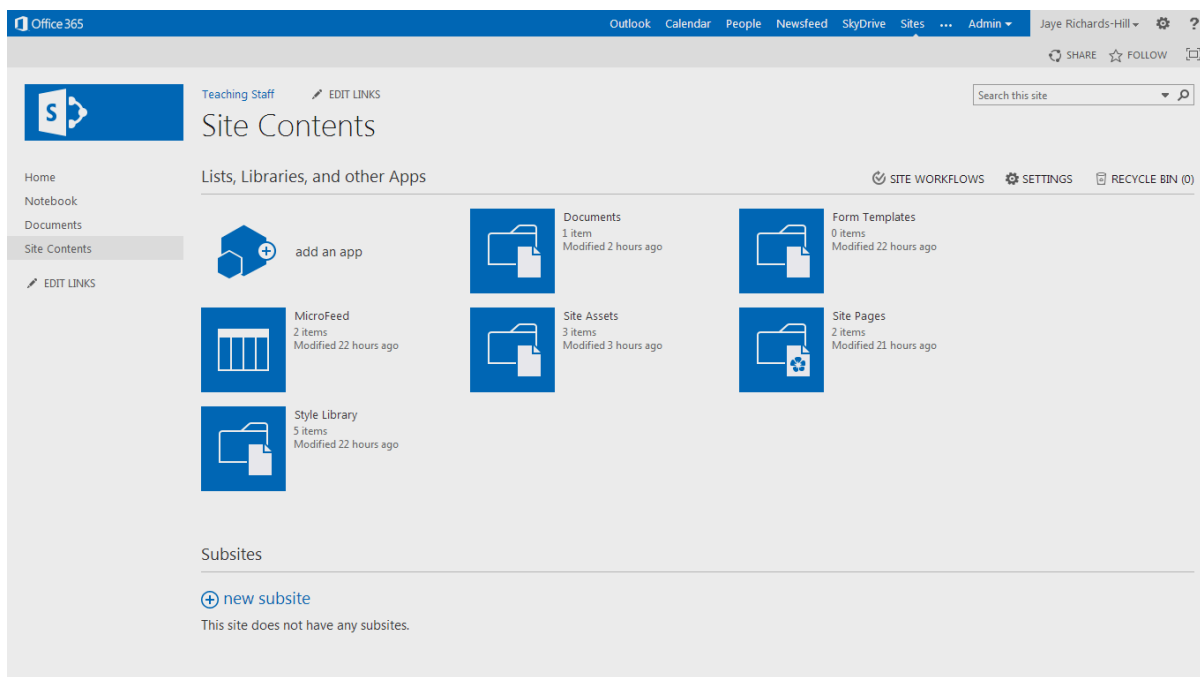
## 3. Adding Apps

- Click on **add an app.** This will give you a choice of several **apps** you might want to add to your site. They are easy to add by just selecting an app and following the instructions.  Why not explore some of them? You might choose to add a **Calendar, Picture Gallery** or **discussion board** to your **site page**.
- Try clicking on the **Links** app. You will see a screen asking you to give your Links app a name:
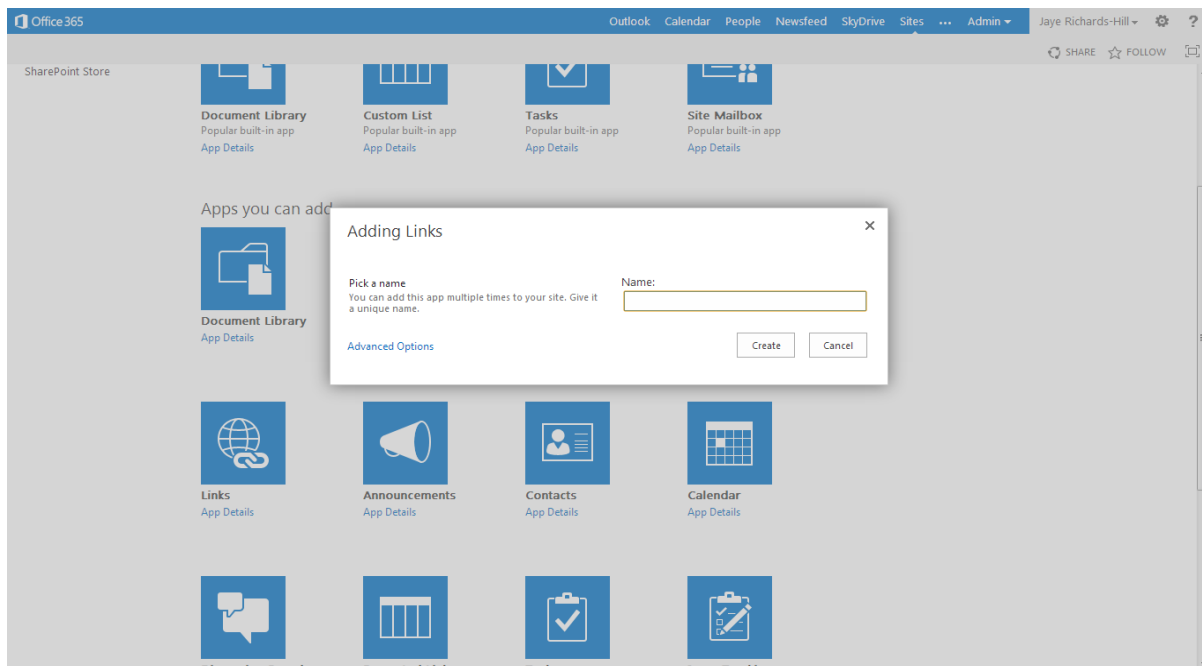


- Let's call it **Staff Weblinks**. Type the name into the box and click on **Create.**
- Your new **app** will appear in your Site Contents:

Microsoft
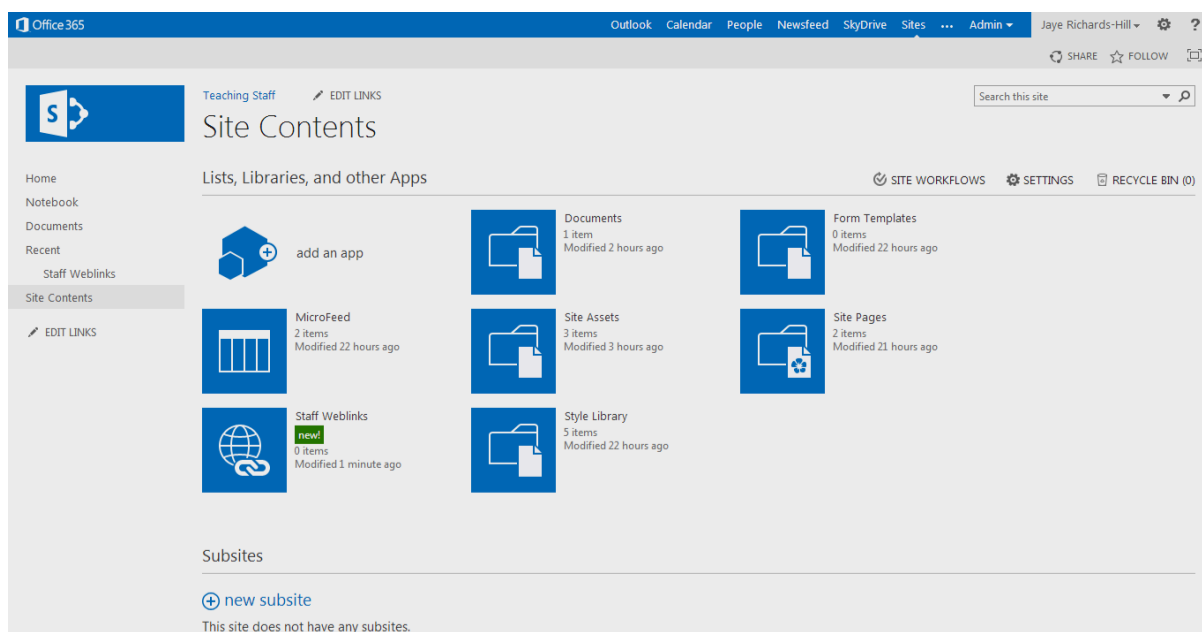
- It will also appear on the left-side menu. If you click on it, you can start to add **Weblinks** that you want to share with your team.
- Other apps you add will appear in this menu as well. The procedure for adding other apps is the same.
- Try adding the **Tasks** app and setting up a **group task** for your site collection users to complete.

## 6. Editing your site collections page

- Now return to the front page of your **site collection** by clicking on **Home** again.
- The blue boxes contain suggestions for different functions you might wish to add when you become a more advanced user. Hover your **cursor** over each box to reveal a short description for each of them. When you have finished browsing the blue box suggestions you can remove them from your page by clicking on **Edit** on the top right of your screen.
- Your screen will look like this:
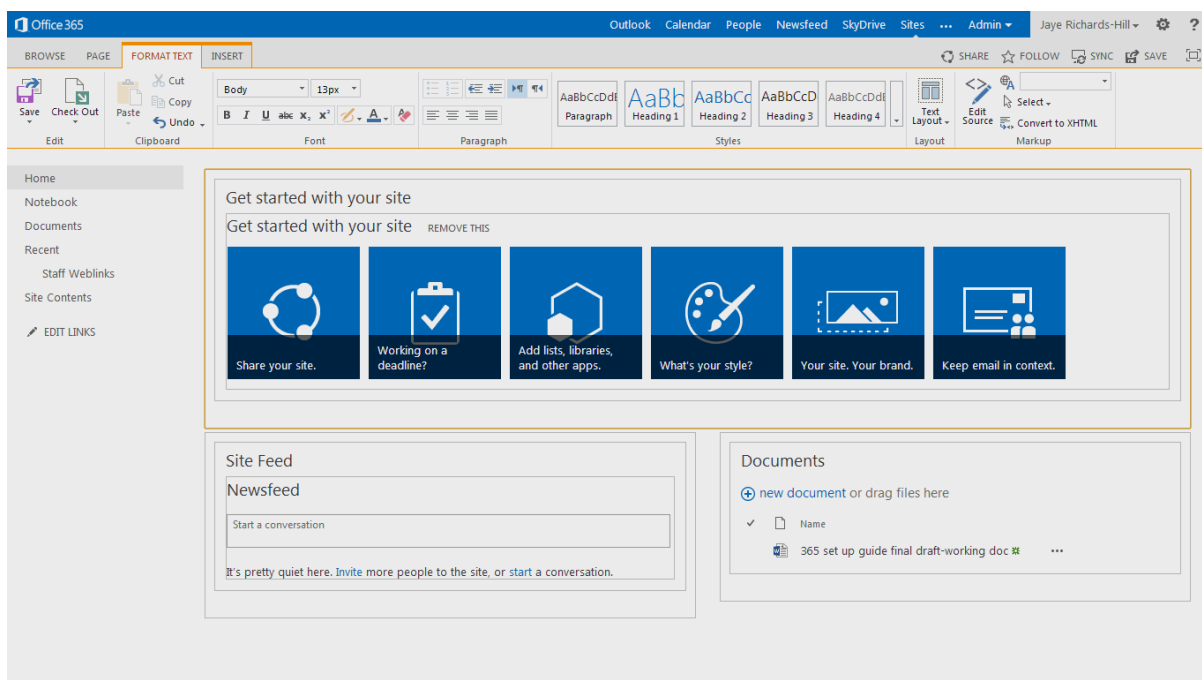


- You will see that the section with the blue boxes is called **Get started with your site.** This is called a **Web Part**. Click on **Remove this** to remove this Web Part from your site front page. A box will appear asking you to confirm this.
- Click **Save** in the top right of the screen. You will now be returned to your **site front page** and you will see that the blue boxes have been removed.
- The **Edit** function allows you to change the appearance of the different parts of your **site collection** pages, move parts around or delete them. These more advanced functions will be covered in later guides.

Microsoft

## 7. Giving users access to your site collection

All that remains now is for you to give your teaching staff users access to your site. To do this, you need to be on the **front page** of your **site collection.**

- Click on **Share** on the top right of your screen. This screen will load:
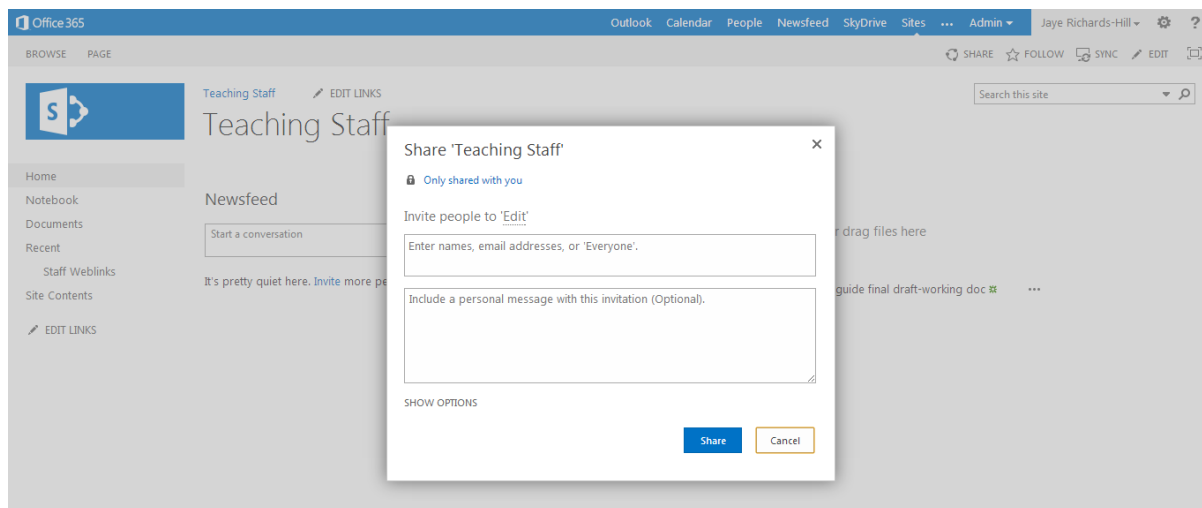


- You can now type in the names of the users you want to give access to. As you type their names, you will be prompted with their usernames to select. You can add multiple names in this box. Add a message in the box below and click **Share.** The users will be added to your team and will receive an email letting them know about the new site. Once they follow the site, updates will appear in their own **Newsfeeds.**
- If you click on **Show Options** at the bottom left of the window, you will be given a list of different **permission levels** that you can assign to your team members.
- The default setting is **Edit**. This allows them to add and **check out** documents and **edit** them.
- You might want to give some members rights to add **resources, apps** and **links** as well as change the layout of the **site** and set up **subsites** - for example, your department heads might want their own subsites. Select **Full Control** before inviting these users and let them know that they have these enhanced rights to make changes to the site in the message you send.
- You can also invite other users not in your team to view your **site collection**. They will not be able to **check out** or **edit** any documents as they are automatically set to the **read only permission level.**

## 8. Deleting your site collections

Should you need to delete any of your **site collections**, open the link to the one you wish to delete, and follow these instructions:

- Go to the **settings** icon (the wheel-shaped icon next to your name at the top right of the screen).
- When you hover over this icon, the word **Settings** will become visible. Click on this icon and you will see the settings drop-down menu will appear.
- Select **Site Settings** from this menu and the full settings page will open in your screen.

Microsoft

- In the **Site Actions** group of functions, click on **Delete this Site**. (There are lots of different options and functions on this screen - you might want to take some time to explore them)
- Follow the instructions. You will be asked to confirm your request to delete. This is a safeguard that allows you to check that you are ready to delete and that you are deleting the correct site collection. You will then be given the option to click back through to your SharePoint dashboard.

## 9. Now think about hierarchies

As you add users to your team and they begin to gain more confidence in working with SharePoint, they will probably want to set up their own sites. As institution administrator, you will need to decide on an establishment policy about **SharePoint sites hierarchy.**

Your **hierarchy** is the way in which your **site collections** with their **subsites** are organised. You have many different options, including:

- There might be **main site collections** for **significant user groups** such as **Leadership Team, Administrators, Teaching Staff** and **Students**. **Subsites** then branch off from these **site collections** such as different **department** subsites from **Teaching Staff** and **classes** and/or **subjects** from **Students**.  This is usually called a vertical arrangement.

- Each **department or faculty** might have its own **main site collection**, with **subsites** for **teaching staff**, **students** and **grades/classes**. These might run alongside the other **main site collections** for **staff** and **students.**

- Each **year group** might have its own **main site collection** with **subsites** for teaching staff and students and further **subsites** for subjects and different classes.

Whatever **site collection hierarchy** you chose, you should plan it out carefully with your institution Office 365 working group.  Otherwise, you might end up with a very disorganised structure that would then be much more difficult to fix at a later date.

**Microsoft**

# User Scenario - Setting up a public website with SharePoint

As well as **site collections** that can be used within your education institution, **SharePoint** also gives you an option to build a website that can be seen by anybody outside of your institution **Office 365** site. You can have one website for each **tenancy** you have in **Office 365.**

Cobus van der Graf is a teacher who is also an administrator for his school. He has been asked by his Principal to set up a basic website in SharePoint so that important information is shared with everyone, including parents and caregivers, and so that the public can find out a little more about the school.

Cobus logs into **Office 365** and goes to the **Admin** tab at the top right side of his Office 365 dashboard. From the drop-down menu he selects **SharePoint** and his **SharePoint Admin centre** screen opens up.

- Cobus clicks on the **Website** link. It is the link above the **site collections**.
- The **Website** page opens upon his screen. He reads the notes on the screen and starts to think about what information and content he might put on his institution's site.
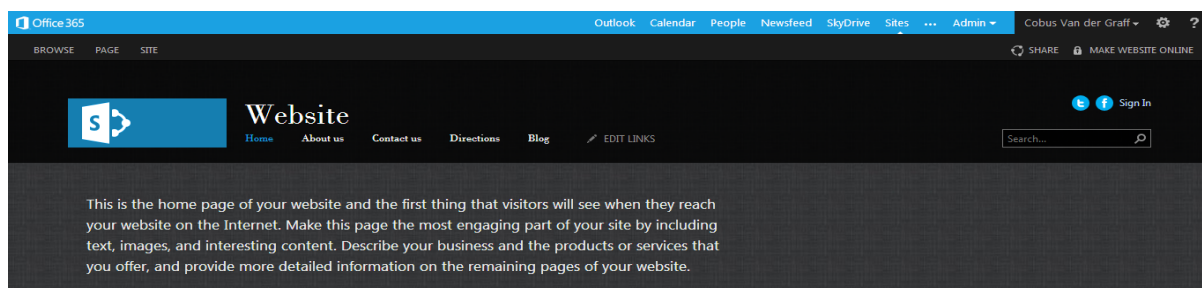


- He hovers on the tabs at the top of the screen. Clicking on them reveals suggestions for content in each of the five tabs that load the **Home, About Us, Contact Us, Directions** and **Blog** website pages.
- Cobus is already starting to get some ideas for the new website. He looks at some of the other functions before starting to build it.
- In the top right corner of the screen, he sees the options for sharing his site with other users and for making the website public by **publishing** it online.
- There are also **Social Media Plugins** for **Twitter** and **Faceboo**k. These let people viewing the website go directly to the institution's own Twitter feed and Facebook page.
- The tabs at the top left side of the page for **Page** and **Site** enable Cobus to access the editing functions of each of the website pages. Selecting **Browse** returns him to the Home screen.
- The **Edit Links** '**pencil' icon** after **Blog** in the Website **tabs bar** allows Cobus to add more **tabs** to the **tabs** bar, and therefore, more **pages** to the website.

Microsoft

# 1. Building the Website

- Cobus is now ready to begin work on the website**.** He clicks on the **Site** tab at the top of the screen. This takes him to the toolbar that enables him to change the website appearance.
- Hovering over these functions reveals an explanation for each. Cobus quickly starts to understand how the site can be built. He clicks on **Change the Look.**
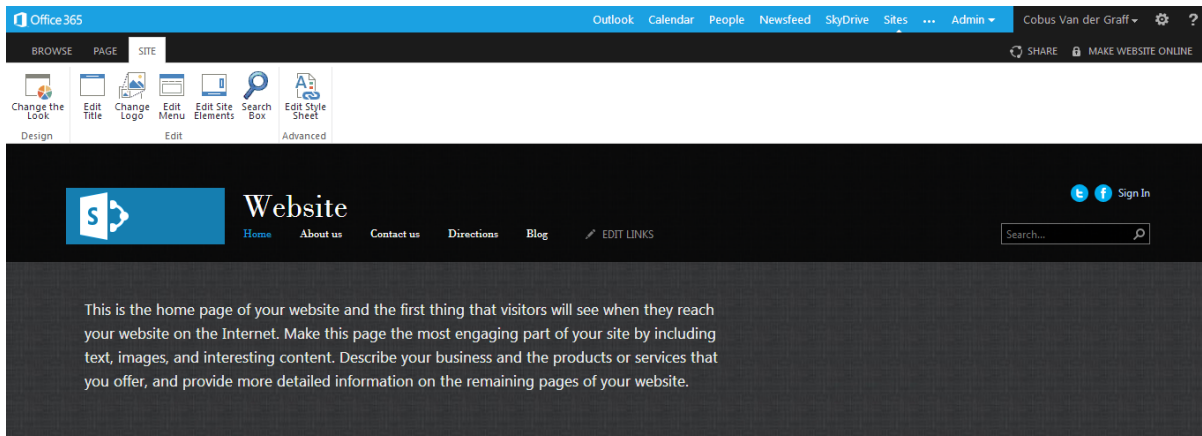


- A selection of *templates* to choose from appears. Cobus browses the available selection and clicks on his choice. He is then able to change the *colour scheme, page layout* and *fonts* from the options on the left of his screen.
- Cobus can try out his new design changes before saving and applying them to his site, by clicking on **Try it out** on the right of the screen.

Microsoft
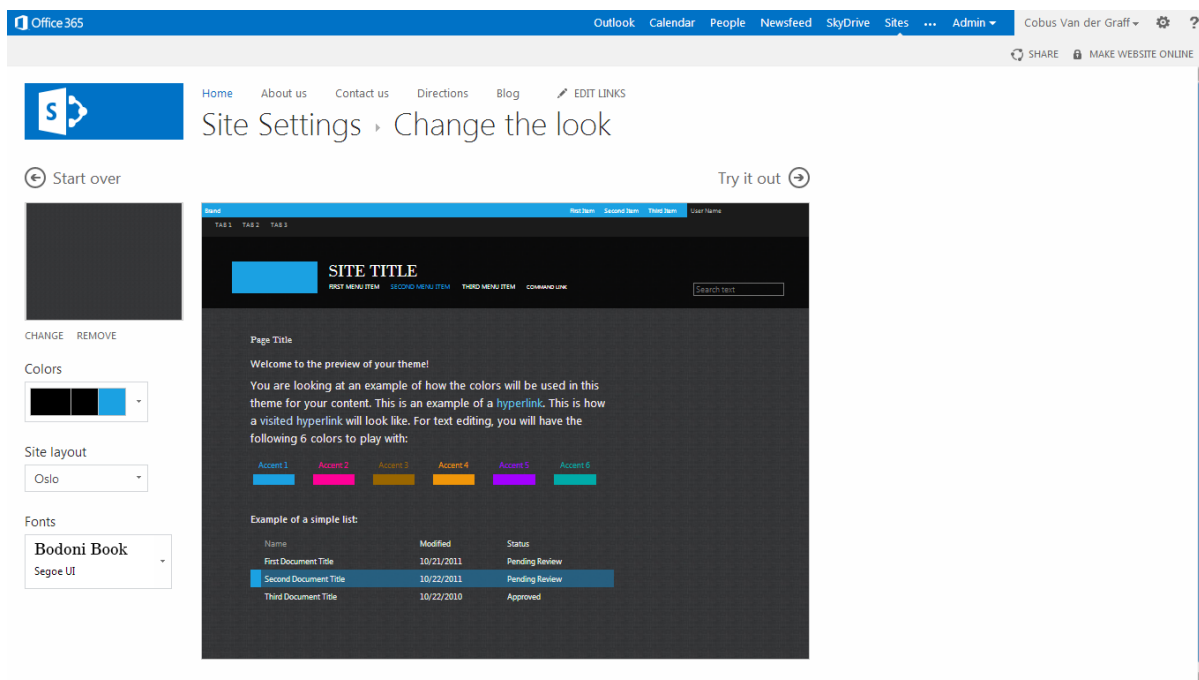
- Cobus explores the different options. He eventually comes up with a design he is happy with and then clicks on **Try It Out** one more time. When the new design loads, he clicks on the **Yes, Keep It** option to the right of the screen.  His freshly designed site then loads on his screen.
- He clicks on the **Site** tab again to continue editing his website.
- Cobus then clicks on **Edit Title** and adds the name of the institution.
- He continues to work his way through the site editing toolbar options, adding the school logo and a **footer message** containing the school motto. He leaves the advanced functions until he feels a little more confident in using **SharePoint**.
- Cobus now returns to the website Home page using the **Browse** tab at the top left of the screen. He clicks on the **Page** tab next.
- This reveals a **toolbar** that he can use to edit the elements on the page that he is busy working on. As he was on the Home page when he selected the **Page** tab, he is now able to edit the text on this page as well as the **footer**, which will appear on every page on this website.
- He deletes the suggestions text from the content box and types a welcome message from the school principal, also adding a picture of the school to go with the message. His Home page now looks like this:
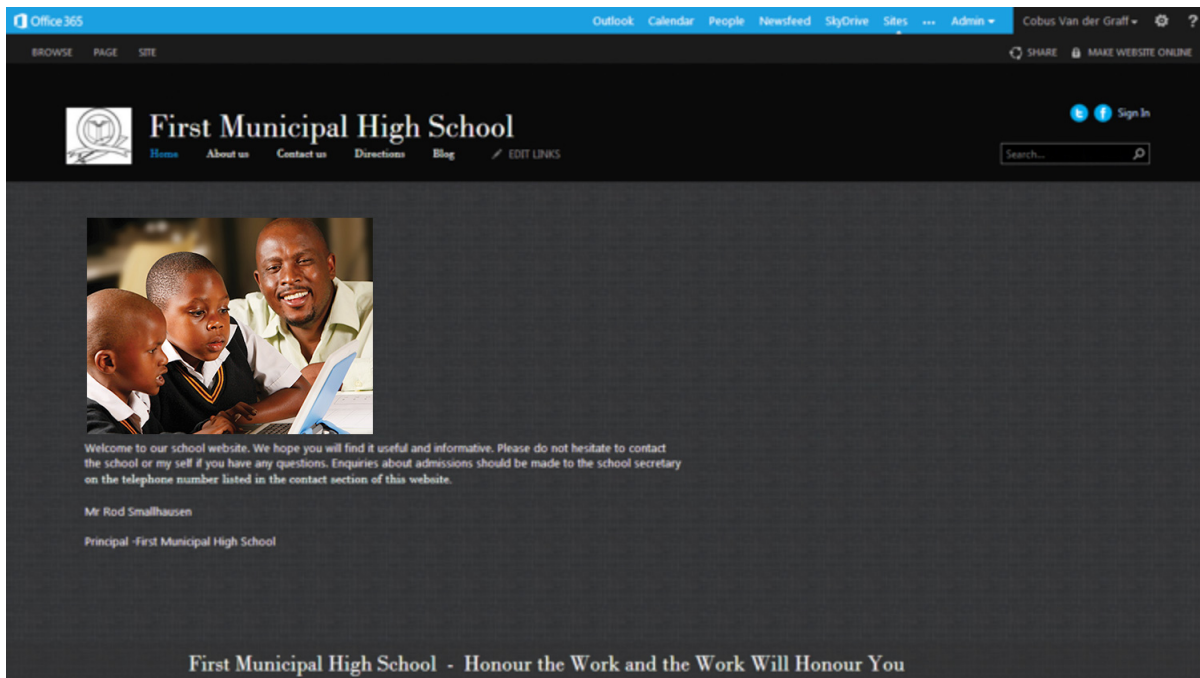


- Cobus now works his way through the pages using the tabs for **About Us, Contact Us** and **Directions.**
- He uses the Page tab toolbar to edit these pages, inserting the content onto each of the different pages.
- Cobus is now realising that designing the site is really not that complicated and is just a case of following instructions and taking the time to explore and experiment.

Microsoft

- Having completed all of the school information tab pages, Cobus clicks on the **Blog** tab. This takes him to the website blog. The page looks like this:
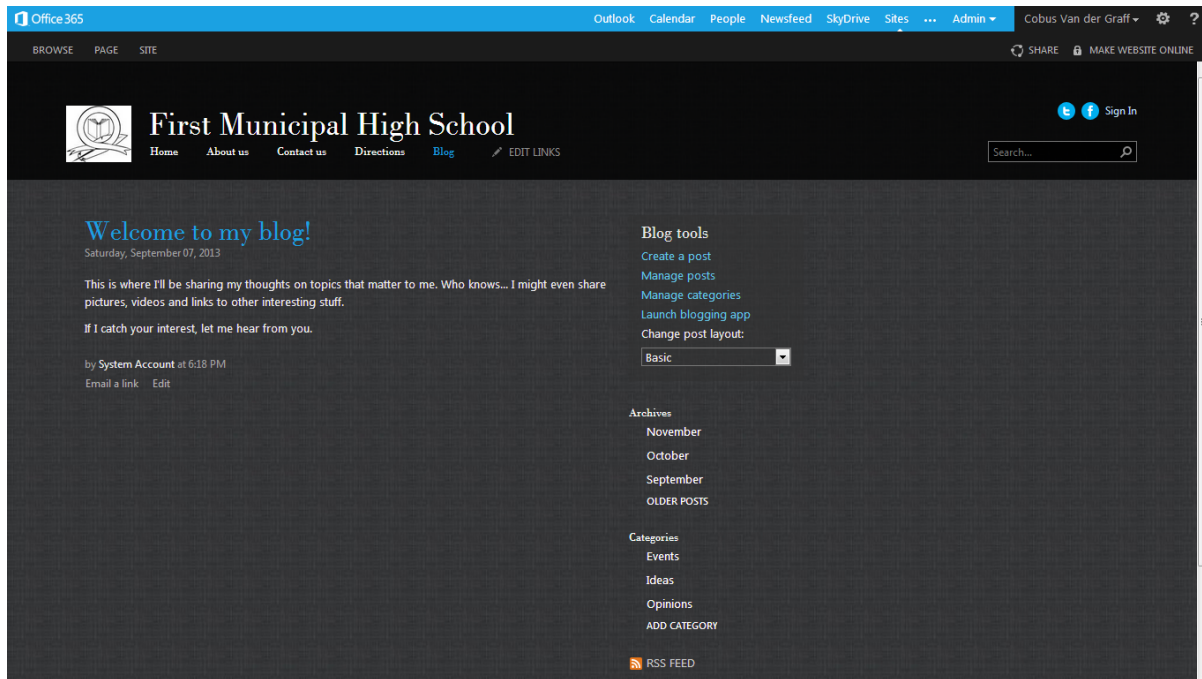


- The blog is a space that is easy to edit and where news items, photographs and other interesting stories about the life of the school can be published.
- Cobus works his way through the **blog tools** on the right side of the page. He creates an introductory **blog post** asking for everybody in the school to contribute items for the school **blog** and then clicks on the **Publish** button at the bottom of the page. His **blog post** then appears in the **Edit** screen.
- On the site homepage, Cobus realises that he can link the school **Twitter** and **Facebook** accounts to the **icons** on the page. He clicks on **Edit Site Elements** in the Site toolbar and a window appears with instructions on how to add both **Twitter** and **Facebook** addresses. When this information is saved, clicking on the **icons** will take users directly to **Twitter** and **Facebook**
- Both of these are **Social Media platforms**. They are an excellent way to communicate with people who are interested or involved with your institution. **Twitter** is a micro-blogging site with an instant messaging service. **Facebook** is where you can showcase your establishment to users.
- Instructions on how to set up accounts for **Facebook** and **Twitter** can be found by going to their web home pages, **www.facebook.com** and **www.twitter.com**
- Cobus is now ready to make the website visible to the public. This is called **publishing.**

**Microsoft**

Office 365

- He clicks on **Make Website Online** at the top right of the page. The following screen appears:
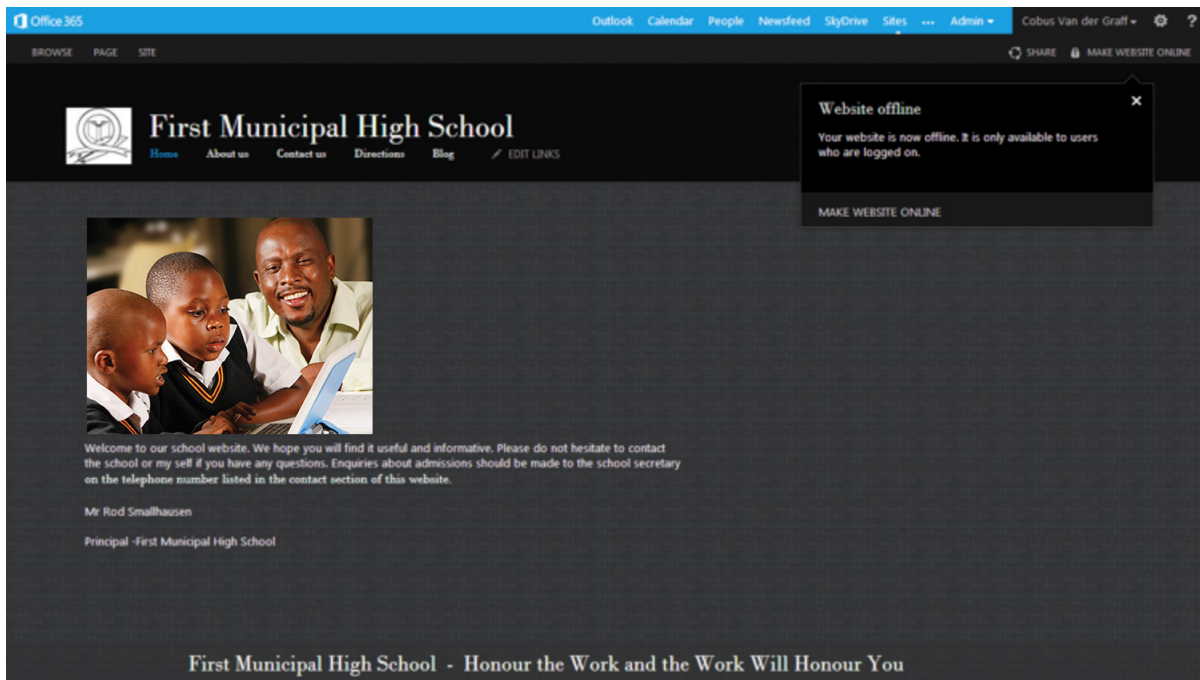


- A warning box appears on his screen and Cobus clicks **Make Website Online**. The website is now published and anybody can now find it on the internet. Cobus sends an email to the school office administrator asking her to include a link to the website in the next school newsletter.

Microsoft

# User Scenario – Creating a Subsite

Thandi Bongani is a teacher at her local High School.  She has been made an administrator of her school site because she is the Head of the Art Department. She wants to set up a **site collection** for her department staff.  Her school Office 365 working group has decided on a **vertical site hierarchy** with all **sites** being subsites of the main **site collections** for staff and students, and so her new site will be a **subsite** of the **Teaching Staff site collection.**

Subsites have exactly the same functionality are the same as other **SharePoint team sites** with.

The **Teaching Staff site collection** in Thandi's school site is going to be the **parent site** to her Art Department **subsite** and all the other **department subsites.** Thandi's colleagues, the Department Heads for other subjects, will also set up their own sites as **subsites** of the **Teaching Staff site collection** at a later stage.

- Thandi logs into Office 365 and goes to her **admin center** page.  Clicking on **Sites** in the top menu bar takes her to a list of the sites she is following (she can search for other sites that she in not following in her institution here as well).
- From the list of **sites**, she clicks on **Teaching Staff.**  This takes her to the main screen for this **site**, and she is now able to set up her **subsite.**
- She clicks on **site contents** on the left menu. At the bottom of the **site contents** page that opens she clicks on the **+ New Subsite** link. This opens up a **New SharePoint site** window. It looks like this:



- Thandi then fills in the empty boxes with information about her new subsite**.**  She gives the site a name (Art Department Staff) and a short description.  She completes the **URL** by adding 'ArtStaff' to the **URL** name box.

Microsoft

**Office 365**

- As this is a department site that will serve as an ongoing **information hub** for her department staff, she selects the **Team Site** option from the **template list.**
- Scrolling down the page, she comes to the **User Permissions** section. Deciding that she wants just her department to have access to the site, she selects the **Unique Permissions** option.
- The next options are about how users will find her subsite. This is known as **Navigation**. Thandi decides that she would like a link to her site from the left hand menu on the main **Teaching Staff site collections** page. She selects this option from the choices, choosing **No** for the option of the top link bar.
- Finally, Thandi selects **Yes** from the **Navigation Inheritance** options. This means that users will be able to see that her site is a **subsite** of the **Teaching Staff site collection** on the top link bar of her **subsite**. She then clicks **Create.**
- The next task is for users to be added to her subsite**.** Thandi is now asked to create three new groups of users. Her screen looks like this:
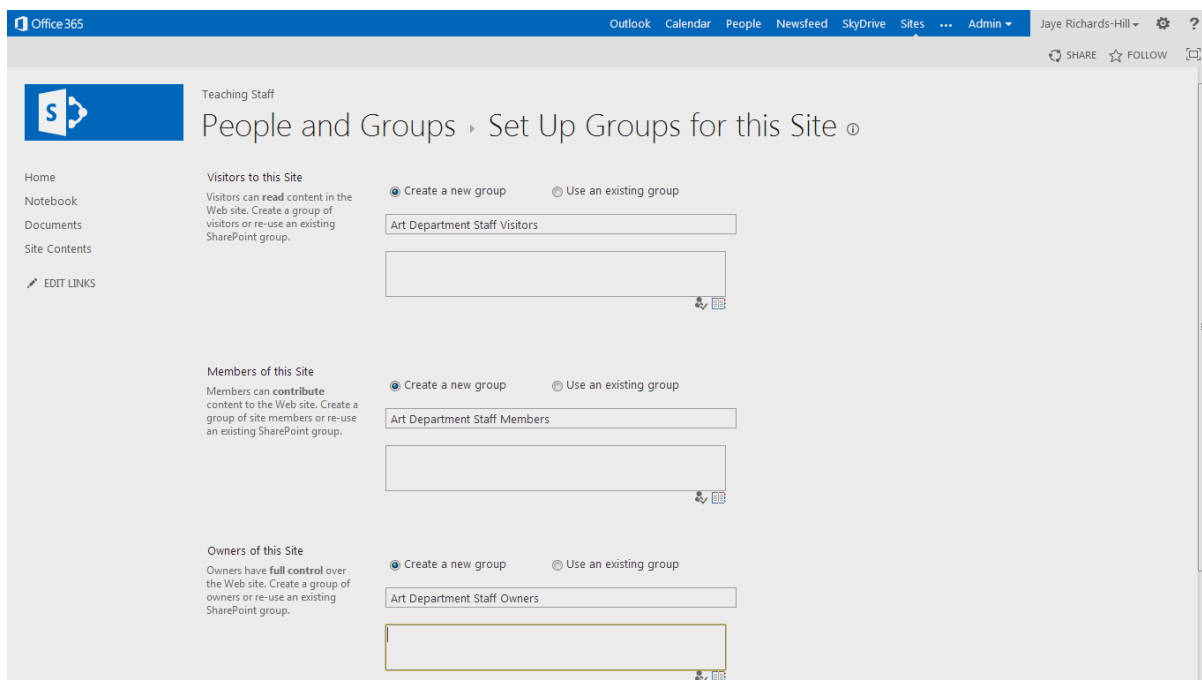


- The first box is for **Visitors**. These might be staff members who are not teachers in the Art Department but who might be interested or need to be able to read the content on the subsite. Thandi decides to give her school leadership team Visitor permissions.
- Going to the **browse** command (the grid icon at the bottom right side of the box), she types their names in the **find** box and clicks the **search** icon, repeating this until all her school leadership colleagues' names are displayed. She then highlights them and clicks on **Add.**
- These names now appear in the **Visitors** box of the **People and Groups** screen.
- Thandi repeats these steps for both the **Members** and **Owners** sections on this screen, adding her department staff as **Members** and herself and her deputy as **Owners**. Having two owners is always a good idea, in case of unforeseen absence or other circumstances.
- She then clicks **OK** and waits for her site to be created. A link to Thandi's subsite will appear in a list of subsites on the left side menu of the main **Teaching Staff site collections** page.

Microsoft

- She can now use the site as a **'virtual staffroom'** for her staff team. She reminds herself to post regular updates for her team in the **NewsFeed.**
- Office 365 will help her team to connect, collaborate and create.
- Some of the **apps** and **tools** Thandi intends to use on the Art Department team site are:

  - A **Team Calendar** to coordinate all Art Department-related activity such as assessment dates, examinations and coursework deadlines.
  - **Newsfeed** for messaging and keeping up to date with changes to collaborative documents.
  - A **Site Mailbox** app so that emails about Art Department business will be collected in the **mailbox** and can be accessed by everyone in her team. Important documents can also be emailed to and from this team mailbox.
  - A **Tasks** app so that her team can see progress and deadlines on group projects at a glance on a timeline.
  - A **Discussion Board** app so that her senior students can have subject-related online conversations with their Art Department teachers within the safe and secure environment of Office 365.
  - A **Document Library** to store student reports and other administrative material. She thinks this will help her teachers collaborate on writing student progress reports for parents and caregivers. Another separate **Document Library** app could act as a repository for useful **professional development** resources for her team.
  - An **Image Gallery** app for keeping a digital record of coursework from her students. She thinks she might allow other staff members to access this app and view the artwork.

Microsoft