An End User’s Guide to SharePoint Online

As much as a SharePoint Online (SPO) migration impacts admins and IT personnel, it’s implications for end users are major. While many fill focus on the effect the transition will have on the former, it’s equally essential that the latter understand how migration will change the way they work, how they’ll need to adapt, and how to seize on the benefits of the powerful platform newly at their disposal.

As such, we wanted to create a guide for you--the end users--to help you understand what SharePoint Online deployment and use will look like...and why you should be excited!

Storing Shared Content in SharePoint Online Means Change...For the Better

It’s completely understandable for some of these changes to feel foreign at first. When adopting SharePoint Online, there are naturally going to be elements that are initially confusing, even frustrating, simply because they feel so completely new and different.

With this in mind, it’s important that you let your administrators know about any concerns that you do have with regards to your content. These might cover topics such as:

- Is all the content I interact with being migrated to the same location?
- If not, can I help you dictate where I think certain things should go?
- How will my department/teams look in SPO?
- My Excel sheet has a lot of links. How are we handling that?
- Applications depend on these files.
- The following files need to remain where they are because of their sensitive content.

A proper migration is one that’s organized in such a way to ensure that you never lose touch with the files that you need to operate successfully. SharePoint Online’s design means that different pieces of content are suited to different locations and site types. Getting a handle, as soon as possible, about where files that you rely on are being migrated will not only ensure that you can access whatever you require, but can also serve as a use case for where you’ll want to store future content, depending on its nature.

While this all may sound daunting, it’s these changes and nuances that make SharePoint Online so effective as a storage and collaboration solution. When you get the hang of the platform, you’ll soon be asking why you ever relied on anything else.
**You’ll Collaborate in Ways You Never Imagined**

Understanding the differences in site types in SharePoint Online is essential to success within the platform, and—if you’ve read our other content—you probably think we’re a bit of a broken record on the matter. These differences range from obvious to subtle, but feeling confident in identifying them is the key to the collaborative capabilities for which SharePoint Online is famous.

<table>
<thead>
<tr>
<th>Site Type</th>
<th>Description</th>
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<tbody>
<tr>
<td><strong>Yammer</strong></td>
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- Share important information with your entire organization  
- All users can comment on posts  
- As opposed to in Team Sites or email, content is less likely to get buried  
- Should not be thought of as a storage-first option, more of an information dissemination option |
| **Teams** |  
- Team centered, IM-style, collaborative sites  
- Share content and communicate with team members in real time |
| **OneDrive** |  
- Top-notch security  
- Geared specifically for personal files, less of collaboration/shared drives  
- Automatically will sync to your computer |
| **Site Collections and Hub Sites** |  
- Content is more permanently stored with organization in mind  
- Content is updated slightly less frequently  
- Owned and managed fully by IT or department heads  
- High level of control over sharing, permissions, and security  
- Can contain Team Sites, Yammer, and Outlook groups within it |
| Outlook Groups / Team Sites | • Slightly more control for IT  
• Geared towards team collaboration for more permanent teams.  
• Share content in a slightly slower, less frequently updated manner. |

For some, looking at all of this information can be frustrating, like the feeling of studying flashcards before a test. However, that outlook ignores the best way to understand sites: understanding your team. As you work in SharePoint Online, the questions you should consistently be asking--of yourself and of your colleagues--is “how do I work? How do we collaborate?”

SharePoint Online is designed such that there is a tool or a location suited for any type of work, any approach to work. When you identify how you’re working and what they need, understanding which site type or location is suited to their current mission becomes second-nature.

With this in mind, you’ll find that the diversity and variety of sites is not an encumbrance, but an advantage. It ensures that every single piece of your content has a home suited for it, and every single task or project you embark on has a set of features uniquely designed to help. With this in mind, you’ll find yourself working and succeeding in ways that you’ve never even considered, or dreamt of.

**Learning the Ropes of SharePoint Online (Site Management and Creation)**

While expansive and multi-layered, learning how to navigate in SPO is not as difficult as some would have you believe. Like many of Microsoft’s offerings, the interface is straightforward and intuitive.

How do you get to SharePoint Online? Directly from your Office 365 dashboard! Navigational ease is essential to the platform, and permeates every element of SPO.
On the left-hand side of the page, you’ll find a toolbar with links to all of your sites, important links that others have shared, which pages you’ve visited most recently, and more. Like much of your personal SPO layout, you can dictate what you want to see, and remove what might be distracting.

When you enter one of your sites, the interface is just as intuitive, ensuring that you don’t have to spend valuable time hunting for the content that you’re looking for. All content is easily accessible in the Documents section, reachable via the menu of the left side of the page.
The toolbar within each of these sites is tailored to the purpose of the site type, ensuring that you have quick access to all the unique facets of each site, and feel comfortable navigating them.

Creating new sites is easy as well, though the ability to do so depends on the protocols that your admins have established. In some businesses, users are not able to create sites, so it’s helpful to speak with your admins about what the protocol for your environment will be.

Should you have the power to, however, SharePoint Online lays out each of the necessary steps so that you don’t find yourself floundering.
Once you’ve selected the type of site you want—the benefits of each helpfully laid out from the beginning—you’ll be asked to select certain settings. Even in organizations where admins are onboard with users creating sites on their own, there will likely be certain restrictions or general guidelines around site creation. Whether it’s naming conventions or privacy settings, it’s important to keep these in mind as you build your new site, and invite other users to collaborate. Creating sites without much consideration can lead to cluttered SPO environments, and jeopardize file security.
Once you’ve finished selecting settings, there’s only one more step! On the following screen you’ll be asked for the emails of any additional site owners or members that you’d like to add. Each of these individuals will receive an email alerting and inviting them to the site!
While the site will be the hub of your collaboration, the corresponding Office 365 group will provide another avenue for your team to communicate and share relevant resources.

Depending on the type of site you create, there will be different features and capabilities, but one of the most important is your document library. SharePoint Online document libraries are exactly what they sound like: a repository for all of the different files that you upload to your site.

These libraries are automatically built into Team sites, and are incredibly easy to manage. Following migration, the sites that your admins have crafted will have relevant files already stored in the document library, but uploading additional files is completely straightforward. You also have the ability to create new files directly within the library using Word, Excel, PowerPoint, or OneNote.
For sites that will contain a lot of different, diverse files, you can also create multiple document libraries, and select to show them within the site navigation. That way, you can designate different libraries for different projects, and keep your files organized to the degree you find most useful.

As you become more comfortable with SharePoint Online, you can explore the powerful integrations it has with other aspects of your Office 365 suite—such as Microsoft Flow. A dynamic automation and workflow tool, Flow allows you to create processes that react to your behavior in SPO, or update your SharePoint Online based on your behavior in other applications. For instance, you can design a flow that ensures you get an email anytime any member of your group posts new content to the site!

**Accessing and Managing Your SPO Files**

As one of the chief purposes of SharePoint Online is collaboration, it’s essential that you understand where your content lives, how to work on your files, and how other users can work on them as well.

Now, the interface in past few screenshots is comparatively simple, but it’s likely that your SPO environment will contain hundreds, perhaps even thousands of sites. Also likely, is that these files were migrated by IT, rather than you and other coworkers. In these situations, you may not be immediately certain where these files have landed. As such, it’s important to be able to quickly find your content so that you can work and collaborate smoothly.

The most obvious way to do this is through the basic search, which appears at the top of your homepage, and within every individual site. If you know what site contains the piece of
content you’re looking for, it’s easiest to go to that site, and search there--narrowing your results. If you’re not entirely certain, however, you can simply search the entire environment. In both search scenarios, a page of recommended searches will immediately appear based on frequently visited or searched sites and files.

In cases where your environment contains a large number of sites, it helps to make certain that you’re following the sites that are most relevant to you--that way you receive notifications when any new files are uploaded, or any major changes are made.

Doing so is incredibly simple. All you need to do is navigate to the site, and, in the top right of the page, you’ll see an empty star next to “Not Following.” All you need to do is click that icon, the star will fill itself in, and the text will note that you are now following the site.

In both Teams and Office 365 Groups, you also have the ability to add an individual or a Group to your “Favorites,” simply by navigating to the person or group, and clicking the Favorite icon--extremely similar to the process described above.
Once you’ve found the files you need, you must familiarize yourself with your options for working on them!

Once you’ve uploaded or created a file within a site, users with editing permissions will have access to that file, and be able to work on it. You and your teammates have two main options when it comes to adjusting the file. On the one hand, if it’s an Office 365 file or a file created with a SharePoint Online integration, you can edit it directly in SharePoint Online. These changes will appear in real-time, and other users will be able to see your edits and the Version History of the file.

Alternatively you can download the file, edit it on your desktop, and then upload your new version over the current one. Similarly, all users will be able to see the Version History of the file, and access previous versions should changes be made that they’d like to revert.

Let’s say that you know that you’ll have to edit or read certain files on the go, but you’re not certain that you’ll have internet access. No worries: because SharePoint Online allows you to sync entire folders or document libraries directly to your desktop.
All you need to do is enter the document library that you’d like to sync, and click the appropriate button. You’ll receive a dialogue window alerting you that SPO is opening your OneDrive, wherein you’ll be asked to select which folders and files you want to sync, and to grant OneDrive permission to sync these files to your desktop library.

Once the sync is complete, the selected files will appear in a folder that includes your profile and company name. This is the only file to which the selected files can be synced.
Once the sync is complete, the folder will regularly update when you have internet access, adding additional files and versions that have been added to the document library you’ve selected, ensuring that, even remotely, you’re in the know with your files.

**Additional Resources**
SharePoint Online is notably complex, and our piece has only begun to scratch the surface of what your experience with the platform will be. As such, we’ve assembled a few other resources that will help expand on what we’ve mentioned here, ensuring that you feel consistently comfortable with your new solution, able to thrive and succeed.

- Microsoft’s SharePoint Online Video Trainings
- SharePoint Maven’s Resource Library
- The Periodic Table of Office 365