

SharePoint Online



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Section 1: An Introduction to SharePoint

Understand SharePoint

What is SharePoint?

SharePoint is a web-based collaboration system that allows you to share information about a specific project, meeting and/or documents with other members of your department, project team, or other organizational structure, either on campus or off.

What are Team Sites?

A Team Site is a site a team can use to organize, author and share information. A Team Site is a collaboration tool where groups of people share information and work together, for example:

- Coordinate projects, custom lists, and schedules
- Discuss ideas and review documents or proposals
- Team/committee collaboration
- Manage a project by assigning tasks & keeping meeting minutes
- Generate alerts for tasks or deadlines

Each Team Site is deployed and managed independently by "Site Owners" at the department level.

What are the responsibilities of a Site Owner?

The Site Owner is responsible for all content, navigation choices, and general Team Site direction as well as overseeing their Team Site's compliance with all WSSU policies and procedures, including those related to appropriate use. By default, members of the Site Owners group have permissions on an individual Team Site. Administration tasks can be performed for the Team Site and for any Document Library or List within the Team Site such as creating (Sub)sites and managing permissions.

Section 2: Create Document Libraries and Lists

Access Your Team Site

To Sign into SharePoint

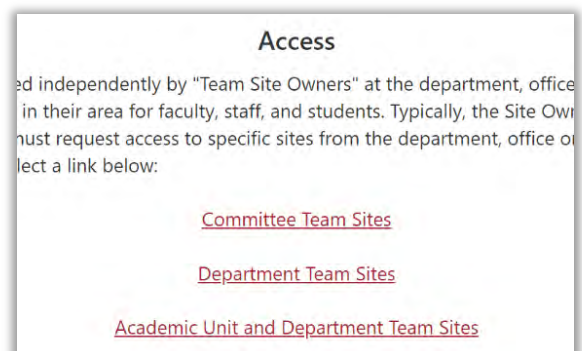
Open your internet browser and enter the URL for the SharePoint Team Sites:

<https://wssu4.sharepoint.com/>

If you are prompted to enter a username and password, enter your WSSU credentials, you may also be asked to provide 2 factor authentication.

Click on the appropriate category link to find your Team Site.

You must be granted permissions to edit a Team Site. If you have not already been granted permissions to the Team Site you need to edit, email Daniel Beaudoin at beaudoid@wssu.edu to request permissions.



Sign Out of SharePoint

Click on your initials or profile picture in the upper right corner of the page > Sign Out.

Identify the Basic Tools

Settings

The settings icon in the top-right of the page contains several options. The two options one should pay particular attention to are Site Contents and Site Permissions.

Site Contents – This page displays all content that exists on the team site, including document libraries, pages, lists, and subsites.

Site Permissions – This is where a site owner can adjust permissions for the site. More granular permissions can be found within page, list, folder, and document settings.

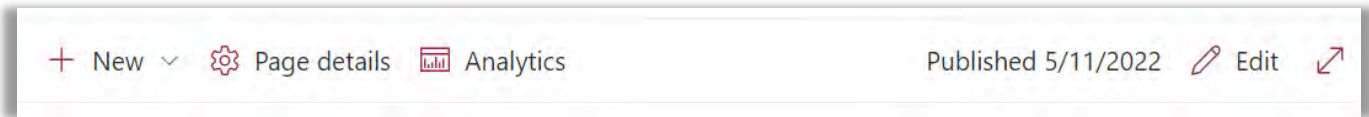
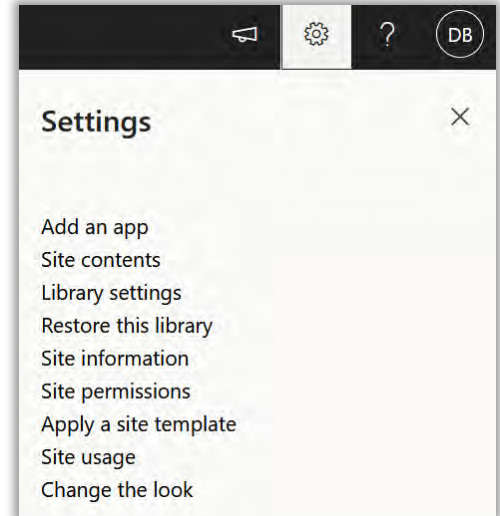
Tool Ribbon

+ New – Allows the addition of new sections to the Team Site, such as Lists, Document Libraries, Pages, and other apps.

Page Details – Displays basic details about a page, like description and last-modified date.

Analytics – Displays useful analytics about a site such as total page views.

Edit – Enables the ability to edit the main content of a page.



Site Navigation

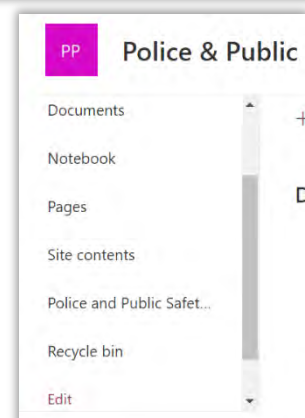
The site navigation is a set of links to pages, subsites, document libraries, and other controls on your Team Site. Custom links can be added to the navigation along with the defaults.

Top Navigation

Typically serves as global navigation, often to the home or root page.

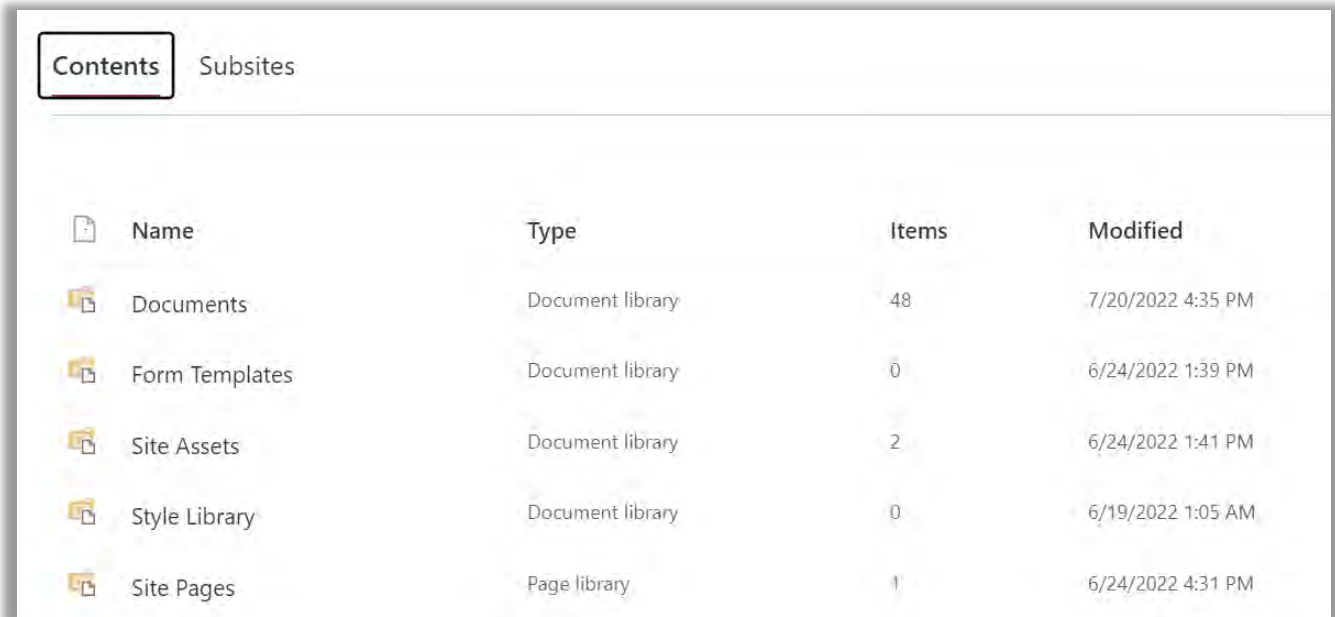
Left Navigation

Typically highlights the important content in the current site, such as Document Libraries, Lists, the Control Panel, and Recycling Bin.



Site Contents

In Team Sites, Site Contents is technically a 'View All' option to Lists, Document Libraries, Apps and (Sub)sites.



The screenshot shows the 'Site Contents' page with a navigation bar at the top containing 'Contents' (highlighted) and 'Subsites'. Below the navigation bar is a table listing various site components. The table has four columns: Name, Type, Items, and Modified. The rows are: Documents (Document library, 48 items, modified 7/20/2022 4:35 PM), Form Templates (Document library, 0 items, modified 6/24/2022 1:39 PM), Site Assets (Document library, 2 items, modified 6/24/2022 1:41 PM), Style Library (Document library, 0 items, modified 6/19/2022 1:05 AM), and Site Pages (Page library, 1 item, modified 6/24/2022 4:31 PM).

| Name | Type | Items | Modified |
|----------------|------------------|-------|-------------------|
| Documents | Document library | 48 | 7/20/2022 4:35 PM |
| Form Templates | Document library | 0 | 6/24/2022 1:39 PM |
| Site Assets | Document library | 2 | 6/24/2022 1:41 PM |
| Style Library | Document library | 0 | 6/19/2022 1:05 AM |
| Site Pages | Page library | 1 | 6/24/2022 4:31 PM |

Section 2: Create Document Libraries and Lists

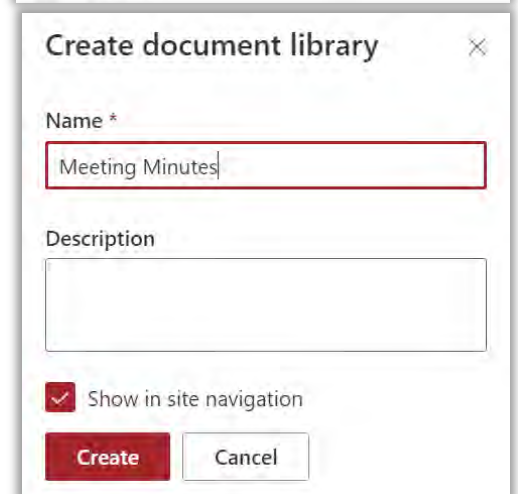
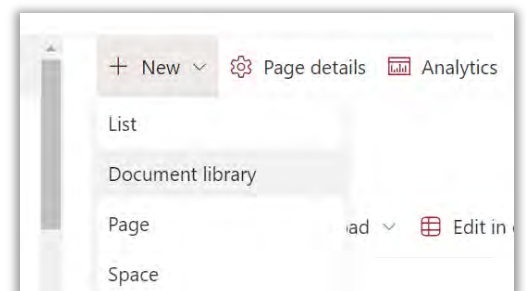
Document Libraries

A Document Library is a place on a Team Site where you can upload, create, update, and collaborate on files with team members. Instead of hunting around for files in different locations, such as personal computers, network disks, and email folders, your team can save files in a library where everyone can find them.

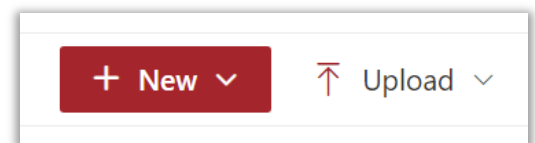
1. Create a new Document Library:
 - a. Click the +New dropdown menu and select Document Library.
 - b. Enter a name for your Document Library. Adding a description is optional.
 - c. Click Create.

Note: Once the **Document Library** has been created, the newly created library will be listed among all the default and custom apps in the view all **Site Contents** page.

2. Add files to a Document Library
 - a. Open the document library by clicking on its link in the left navigation or from inside the Site Contents page.
 - b. Click the +New button and select a blank Microsoft Office document to work and save or click the



The screenshot shows the 'Create document library' dialog box. It has a title bar with a close button. The 'Name' field is required and contains the text 'Meeting Minutes'. The 'Description' field is optional and is currently empty. There is a checked checkbox for 'Show in site navigation'. At the bottom, there are 'Create' and 'Cancel' buttons.



Upload button to select a file from your computer to upload.

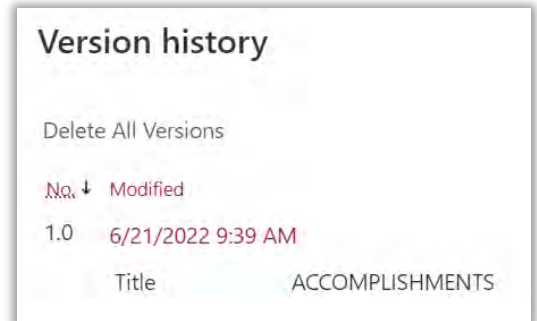
NOTE: You can also drag and drop one or several files.

3. Delete items from a Document Library (See Section 7 for more details about the Recycle Bin):
 - a. Hover mouse over a file or folder. Click the three dots to open the file's menu. Click Delete.

Versioning

With versioning you can see when an item or file was changed and who changed it. You can also see when properties (information about the file) were changed as well as the comments people make when they check files in. If necessary, you can restore a file back to a previous version.

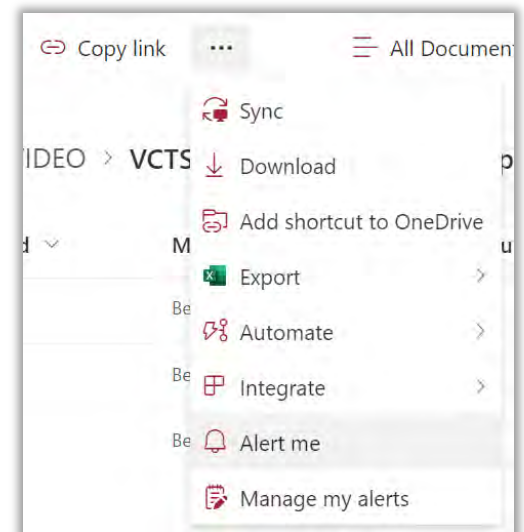
1. Ensure you have navigated to the document library by accessing it from the left navigation or the site contents page. Accessing the Library this way allows use of all of the available options as opposed to accessing a file through a Document Library widget on the Team Site's home page.
2. Hover mouse over a file, then select the three dots to open the file's menu. Select Version history.
3. Click on a version to view or restore it.



Alerts

Alerts can be set on Document Libraries or Lists. With an alert set, whenever a new item is added to the library or list a notification is sent via email or text.

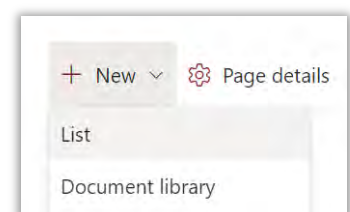
1. Open a Library or List. On the top toolbar of the library or list, click the three dots to open the drop-down menu and select Alert Me.
2. In the Alert me panel, you can add participants to be alerted. How you wish to be notified and the frequency of notifications.
3. Click Ok.



Lists

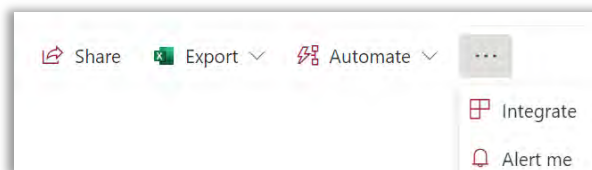
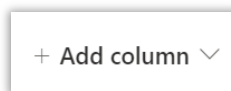
Lists (calendar, contacts, wiki, discussion, etc.) are a key, underlying feature of your Team Site. They enable teams to gather, track, and share information by using a Web browser. Lists typically resemble spreadsheets with rows and columns becoming a part of a data base making it more dynamic and useful for data management. Most data driven solutions are going to involve Lists. Examples of Lists are announcements, tasks, surveys, discussion boards, wikis, links and calendars. Create a Custom List.

1. Create a new List:
 - a. Click the +New dropdown menu and select List.
 - b. Select Blank List
 - c. Enter a name, description, and choose whether to list it in the side navigation. Then click Create.



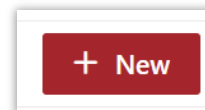
2. Add new columns.

- At the top of the list table, click the Add Column button.
- Choose which field type you would like to use when inputting information into the column.
- Give the column a name, description, and consider advanced options like default values, required fields, or validation.
- You may also export list data and set alerts for when new entries are added from the list's toolbar menu.



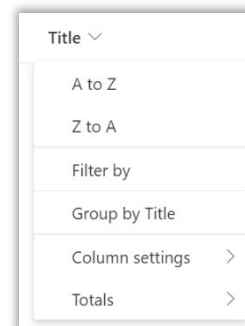
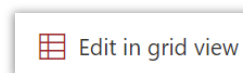
3. Add a new item to a List.

- Click the +New button on the toolbar at the top of the list.
- Enter required information into the fields that are presented.
- Click Save.



4. Sorting and Editing a List

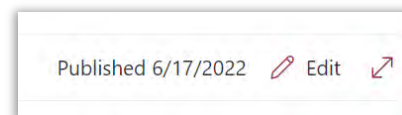
- To sort a list, click on the drop-down arrow on any column heading of a list. Choose the method by which you would like the column sorted.
- To edit a list, click on the Edit in Grid View button. In this view each cell can be edited individually.



Create and Edit a Page

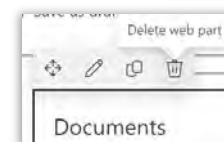
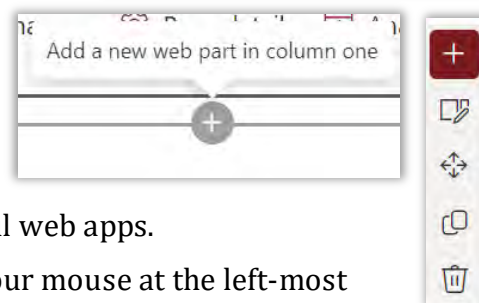
Initiate Edit Mode

To initiate Edit Mode click on the Edit button at the top right of the page.



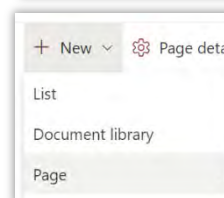
Editing the page

- To add a new section to the page, hover the mouse over a blank section of the page, between existing sections, and click on the plus sign icon.
- You may select from several different web parts, such as blank areas for text, shortcuts to existing site content, and useful web apps.
- You can also add entire new sections to the page by hovering your mouse at the left-most side of the edit area and clicking the plus sign button there.
- You can delete web parts from the page by clicking on the web part, then clicking the trash can icon on the web part's menu.



Add a Page

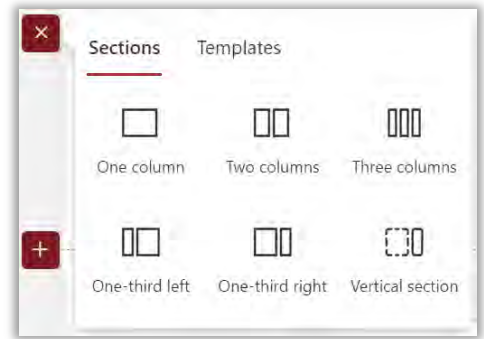
- To add a new page, click the +New Button on the page. Select the Page option.
- Select a template and click Create Page.
- Give the page a title.
- Once you have added content to your page, click the Publish button.



Change the Page Layout

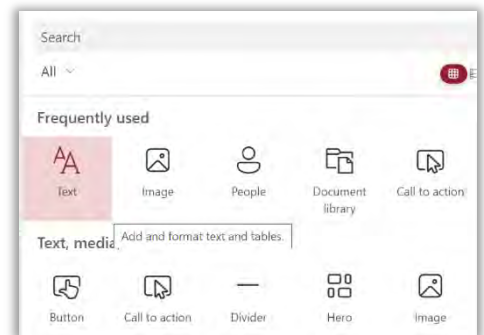
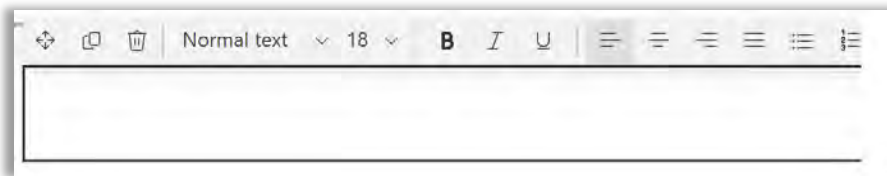
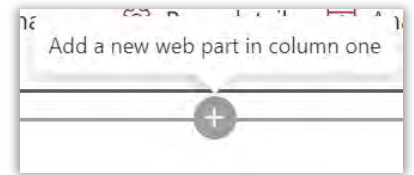
To change the layout of a page:

1. In edit mode, click the square plus sign button on the left of the page.
2. Click the style of layout you want or select a section template from the Template tab.
3. Multiple sections can be added.



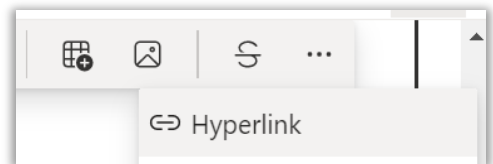
Add/Format Text

1. In edit mode, hover the mouse over a blank section of the page, between existing sections, and click on the plus sign icon.
2. Click the text icon.
3. A text box will open on the page for you to edit. While your cursor is in the text box a toolbar is available for formatting your text.



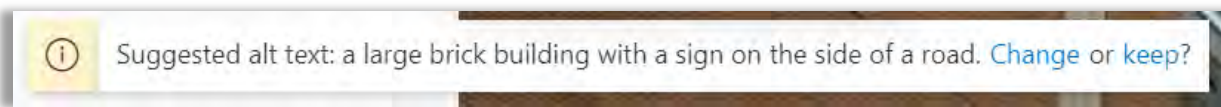
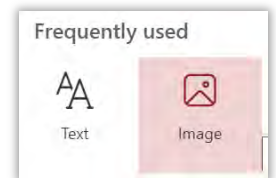
Insert a Link

1. To insert a link within a block of text, first edit a page and create a text box (See Add/Format Text) or place your cursor inside an existing text box.
2. Highlight a section of text and click the Hyperlink option in the formatting toolbar.
3. Enter the URL of the page you want to link and click Save.



Insert an Image

1. In edit mode, hover the mouse over a blank section of the page, between existing sections, and click on the plus sign icon.
2. Select the Image icon.
3. Select the Upload tab.
4. Choose an image from your computer.
5. When you see a message that reads, "Suggested alt text... Change or Keep? Click Change. Provide a short but relevant description for all images. This is a requirement for accessibility."



Note: Pay attention to the layout of sections on your page to ensure the image is where you want it. See "Change the Page Layout" for details.

Manage Permission Settings

As a Site Owner, you control who has access to the Team Site. Granting access is a precise task. You control what information people can see and edit. You also set the level of access: who can only read, who may change the content (add and edit documents) or make someone Site Owner just like you, so they can change the site structure by adding or removing **Document Libraries, Lists, and (Sub)sites**.

Each user is assigned a role which specifies the actions a user can perform on the Team Site. The user roles are as follows:

1. **Visitors:** allows the user to *view only* with *read-only* access to content in the Team Site. This is someone who is only permitted to browse your site. This should be used if you want a user to be able to view the Site Contents but not make any updates.
 - a. Read and download Site Contents
 - b. Search Site Contents

2. **Contributors/Members:** allows user to *contribute* content to the Team Site. The majority of users would fall into this category in order to participate in collaboration.
 - a. All rights and responsibilities of the above role
 - b. Upload and download documents, edit documents, and add and edit pages
 - c. No access to any secure areas of the Team Site

3. **Site Owners (*self-assignment only*):** allows a user to have *Full Control* of the Team Site within SharePoint. Warning: This level of permissions should only be given to fully trained Team Site Owners. ONLY assign these permissions to yourself – Site Owners have permissions to change the settings and potentially DELETE the whole Team Site!
 - a. All rights and responsibilities of the above roles
 - b. Administer permissions

Please keep the following pointers in mind when managing permissions:

- In most cases it is recommended that you use permissions inheritance to create a clean, easy-to-visualize hierarchy.
- When using unique permissions, it's advisable to use groups where possible to assign permissions as it makes it easier to manage large groups. You can create a group and determine the access level. Then you can place people in these groups and they have the permissions level of that group.
- Access can be given to entire Team Sites, individual Sub(sites), Pages, Document Libraries and/or Lists, and individual documents or other items.
- Managing permissions becomes more difficult when it is fine-grained permissions.
- It is best to create a Team Site or a Document Library specifically for sensitive documents, rather than having them scattered in a larger library and protected by unique permissions.

When in doubt, please contact Daniel Beaudoin at beaudoin@wssu.edu or 336-750-2989 to advise you on recommended permissions settings.