

# MS SharePoint – Tip Sheet

## FOR USERS:

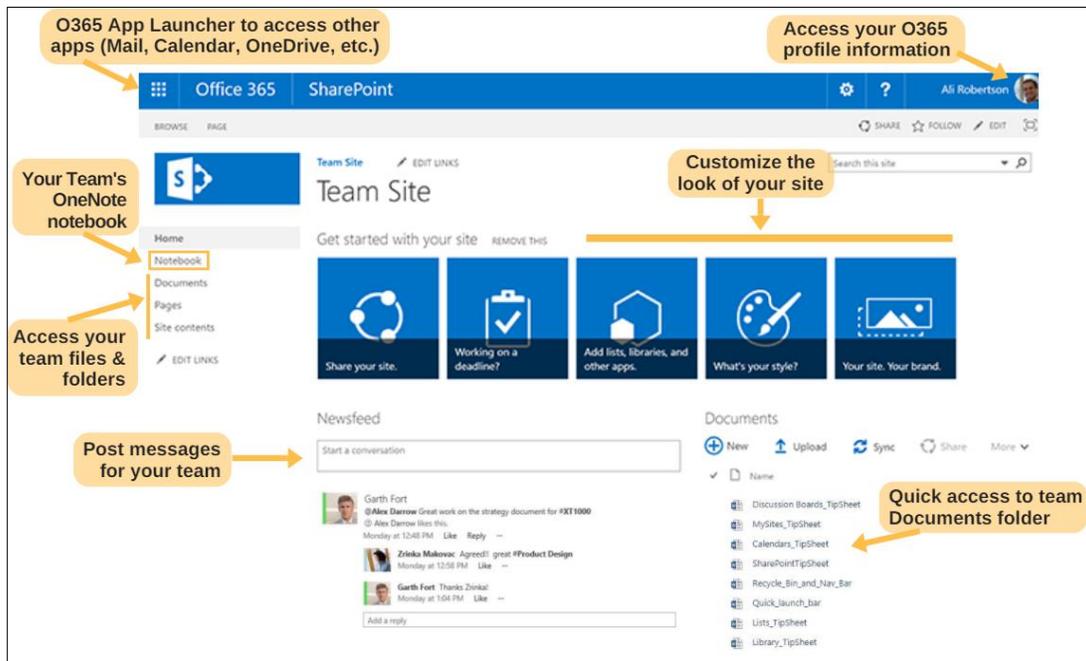
### What is SharePoint?

SharePoint Online is a collection of online tools that makes it easy to store, share and manage your team’s documents. Your SharePoint Online Team Site connects you and your team to content, information and apps you rely on for day-to-day work.

### User Interface Overview

Upon accessing your SharePoint Online Site for the first time, you will see the below items from your homepage. Start exploring to find out what your team needs to create the ideal collaborate online environment.

**Note:** User interface may vary slightly between SharePoint sites based on the setup settings chosen by the site owner.



### Uploading Documents in a Document Library

A **document library** is where you can upload documents for other members of your team to view or edit.

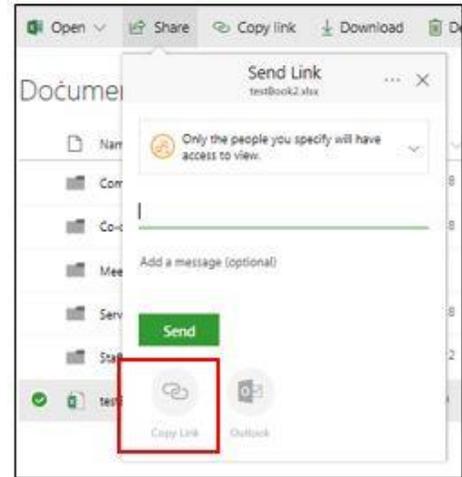
- 1) Browse to the library in which you want to upload the document.
- 2) Click on **Files** – under the Library Tools submenu.
- 3) Click on the **Upload** icon on the menu bar to select desired Document.

**OR**

- 1) Drag and drop documents from your desktop to your SharePoint Online document library.

## Sharing Documents with Colleagues at Michener

- 1) From the desired document library, select the document you want to share and then click the **Share** button.
- 2) Click the dropdown in the Share dialog box. You will see two available options:
  - a. **People with existing access** – This allows you to send a link to the document to everyone who already have access to the file or site. An optional message can be added to these recipients. You may also click **Copy Link** so that you can send a web link to these colleagues through your own drafted Outlook email
  - b. **Specific people** – this allows you to share with people who do not yet have access to your site. To do this, please contact your site owner.



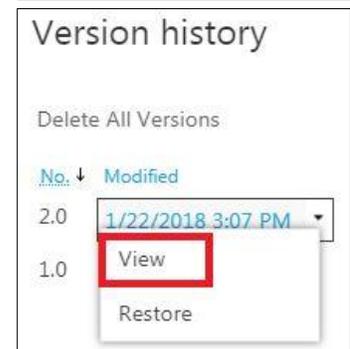
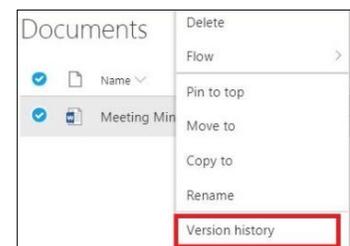
## Co-editing Team Documents in Office Online

- 1) Open a team document from your document library using Office Online. This can be done by right-clicking the document, clicking **Open With**, and then selecting the Online version of the application, such as Word Online, Excel Online, etc.
- 2) When another person accesses the document at the same time through Office Online products, you will receive an alert.
- 3) Edit your document with your colleague. You will also see coloured flags indicating the section they're working on.

## Checking a Document's Version History

- 1) Right click on the **Document**
- 2) Select **Version History** from the drop-down menu.
- 3) You'll see a list of versions of the document. Next to the date and time, you'll see a dropdown arrow. Select the arrow for a list of options.
- 4) Click **View** for more details. You can also select **Restore** if that is the version you would like to restore and work on.
- 5) If you click **View**, a **Version history** box will appear with various actions you can select.

**Note:** For all document versions except the current version, you'll see **View**, **Restore**, and **Delete**. For the current version, you can only view or restore the file.



## FOR SITE OWNERS:

### Site Owner Responsibilities

As a site owner, your responsibilities include:

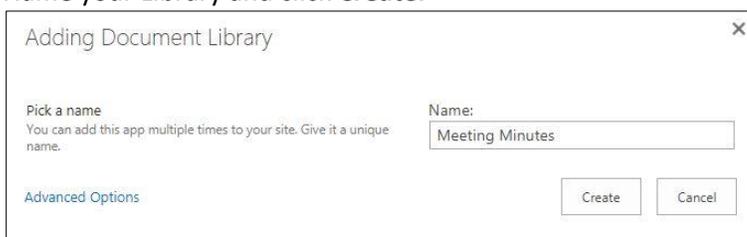
- **Managing user permissions:** You can control who can contribute and who can read only on your site.
- **Managing content:** You will help to create, edit, and delete content (or the site itself – please be careful!)
- **Modifying the layout of pages:** This includes general design of your homepage and ensuring it is intuitive for your team.
- **Adding sub-sites, web parts and objects:** You can create lists, calendars, task trackers, and more
- **General training and onboarding:** You will need to help your team members feel comfortable with the site, directing them to our Information Site, the SharePoint Help Centre, and providing ongoing support as needed.

### Creating a SharePoint Site

- 1) Contact the Helpdesk at [helpdesk@michener.ca](mailto:helpdesk@michener.ca) with your request.
- 2) Please include the following information:
  - a. Will only Michener Employees be accessing the site, or will UHN users need access as well?
  - b. Desired site title. Note: IM cannot guarantee that your desired title will be available.
  - c. Desired owner for the site. It is best practice to have 2 or more site owners per site.
  - d. High level description of what the site will be used for. Allows IM to determine resource allotment
- 3) Please give IM ample warning, as site creation can take up to 5 business days to complete. Once the site is created owners will be alerted via email and the original ticket requester will be informed the task was completed.
- 4) After site creation, the listed site owner is responsible for any customizations, alterations or user invitations for the site. IM will assist with knowledge articles and guidance, but is not accountable.
- 5) If there are any technical issues related to the site, contact [helpdesk@michener.ca](mailto:helpdesk@michener.ca) and we will work to resolve the issue.

### Creating a New Library

- 1) From your SharePoint Online site, click on the **Settings** icon  and then select **Add an app** from the drop-down menu.
- 2) Select **Document Library** on the page.
- 3) Name your Library and click **Create**.



Adding Document Library

Pick a name  
You can add this app multiple times to your site. Give it a unique name.

Name:  
Meeting Minutes

Advanced Options

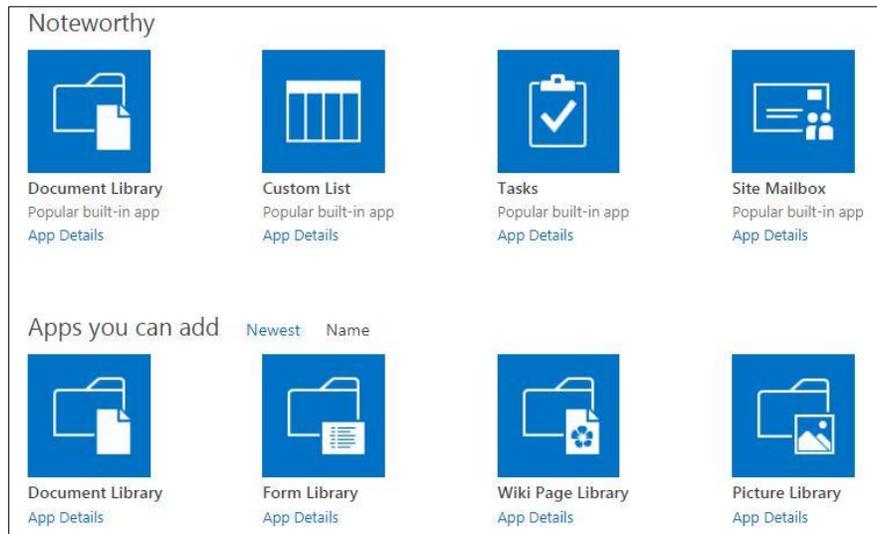
Create Cancel

## Adding Apps to your SharePoint Online site

In addition to document libraries, SharePoint Online allows you to customize your site by adding other apps like task or issue trackers and calendars

On the site where you want to add an app, click on the **Settings** icon  located on the top right-hand corner of the page.

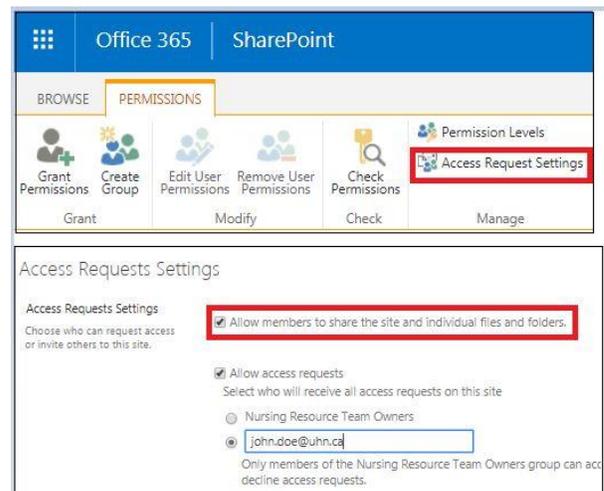
From the drop-down menu, click **Add an app**.



## Allowing your Team Members to Share Documents with Michener Colleagues Outside of your Team

By default, your team will not be able to share team documents from SharePoint Online to other Michener colleagues. To change this default setting:

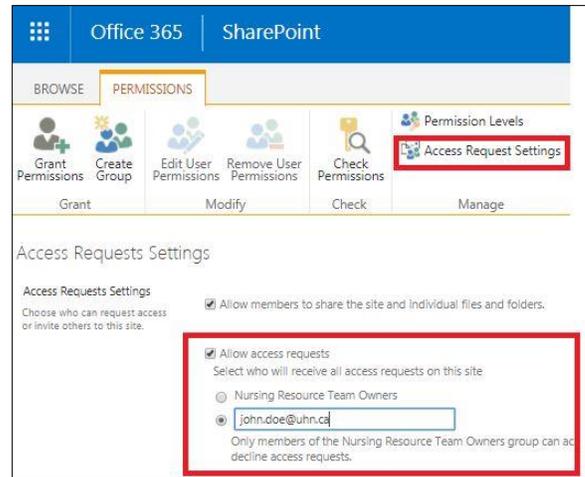
- 1) From your SharePoint Online site home page, click on the Settings icon  and select **Site settings** and then under Users and Permissions heading, select **Site Permissions**.
- 2) Along the top ribbon, ensure you select the **Permissions** tab, and click **Access Request Settings**.
- 3) Ensure **Allow members to share site and individual documents and folders** is checked then click **Ok**.



## Managing Access Requests

By default, your team will not be able to share team documents from SharePoint Online to other Michener colleagues. To change this default setting:

- 1) From your SharePoint Online site home page, click on the Settings icon  and select **Site settings** and then **Site Permissions**.
- 2) Along the top ribbon, ensure you select the **Permissions** tab, and click **Access Request Settings**.
- 3) Ensure **Allow access requests** is checked.
- 4) Enter an email address under **Send all requests for access to this following email address**. Then click **OK**.



## Managing Access Permissions

Site owners have ability to manage user permissions on their site. There are three default permissions levels:



### Viewing Members of a SharePoint Online Group:

- 1) Click on the Settings icon  and then select **Site settings**.
- 2) Select **People and Groups** under the Users and Permissions heading.
- 3) Click on the group name from the left hand side menu to display all members of that particular group.

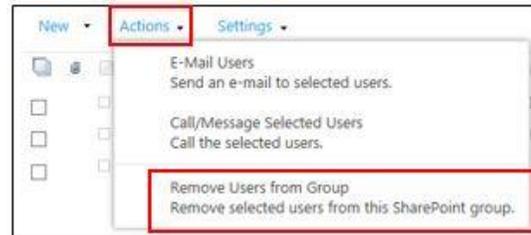


### Adding a user to a SharePoint Online Group:

- 1) From the People and Groups page, select the **New** button to add new users.
- 2) Type in the user's name and click **Share**. An email will automatically be sent to the user(s) notifying that they now have access.

### Removing a user from a SharePoint Online Group:

- 1) From the People and Groups page, select the user you want to remove by checking the box next to their name.
- 2) Select **Actions** and then click **Remove Users from Group**.
- 3) A dialogue box will appear to confirm the action. Click **OK**.



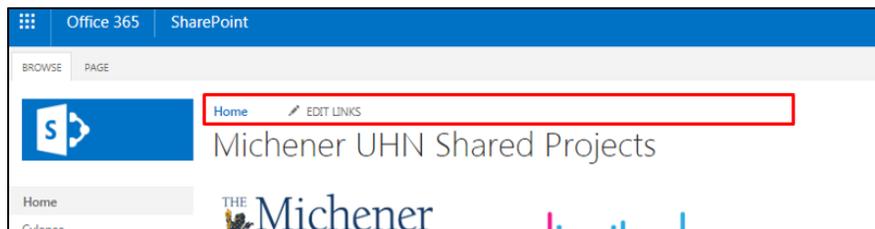
## Customizing SharePoint Online Site Layout

As a site owner you determine the organization and presentation of Web pages, documents, lists and data within your site. Some easy ways to organize the layout of the homepage include updating the Top Link Bar or Quick Launch menu.

### Top Link Bar

The top link bar control displays links along the top of every SharePoint Online page. This is helpful for organizing key top-level folders or other external sites, which your team members may need to reference.

1. Click **Edit Links**.
2. This allows you to add, reorder, rename, and delete links from the navigations.
3. Similarly, you can edit these links by navigating through **Site Actions > Site Settings > Top Link Bar**.



### Quick Launch

Quick launch typically highlights the important content in the current site, such as lists and libraries. It is common for it to appear on the left of each page in a site.

If you want to add, remove, or rearrange the links, click **Edit Link** at the bottom of your **Quick Launch**.

You can also add, remove, rearrange links or create new headings in Site Settings for the site: Settings > Site Settings > Quick Launch (under Look and Feel category).

