SHAREPOINT MEMBER GUIDE

FORWARD

This user guide provides directions for accessing your site, details how to perform many actions to engage with your site, and how SharePoint is used for general collaboration. This guide is continually evolving, so just because it isn’t in this guide, does not mean SharePoint cannot do it. Reach out to ask questions or provide feedback: admin.sp@aphl.org

TABLE OF CONTENTS

Forward .................................................................................................................................................. 1
Introduction ......................................................................................................................................... 2
Basic Setup......................................................................................................................................... 3
  Your APHL Account .......................................................................................................................... 3
  Your Permissions .............................................................................................................................. 3
  Your Password ................................................................................................................................. 3
  Browser Settings .............................................................................................................................. 4
SharePoint Security: Permission Groups ............................................................................................ 5
  Permission Levels ............................................................................................................................... 5
  Site Permissions ................................................................................................................................. 5
How to Find Your Sites ....................................................................................................................... 6
SharePoint Page Breakdown ............................................................................................................... 7
The Ribbon ......................................................................................................................................... 8
Editing a Page ..................................................................................................................................... 9
SharePoint Apps Overview ................................................................................................................. 10
  Lists.................................................................................................................................................. 10
  Libraries .......................................................................................................................................... 12
  Uploading a File ............................................................................................................................... 12
  Check Out/Check In .......................................................................................................................... 13
  Alerts ............................................................................................................................................... 15
  Creating a View ............................................................................................................................... 17
Troubleshooting ................................................................................................................................. 19
INTRODUCTION

SharePoint is a web based collaboration platform by Microsoft; APHL uses the 2013 edition.

The primary goal of SharePoint is to make collaborative work easier:
- Files live in a shared site, URLs/links can be shared instead of file attachments crowding your inbox
- site owners control who has access and what level of access (Read or Contribute)
- all the edits are stored in one place
- everyone can see everyone’s changes
- the system logs users, time stamps and allows for notes to be saved with each version
- you have the ability to get to your work from any computer with an Internet connection

There are several ways to share information with your colleagues:
1. Collaborate on documents (share with a URL instead of an attachment)
2. Create Alerts for yourself or others to be notified when changes are made
3. Create Announcements for your group (which you can set Alerts)
4. Participate in discussion boards (again, Alerts are great!)
5. Store helpful links (for those other resources and sites you commonly share)
6. Use a task list to keep your team moving forward

And all of this can be done on one page, so everyone is on the same page. Certain permissions are needed to perform some of these actions, but generally, most members of a site can perform these basic SharePoint functions.

THE SHAREPOINT LIFE CYCLE

Every site is a container of content: pages, files, images, etc. One website may have many sites (aphlweb.org sure does!)
- Every page is a representation of content within the site, pages sometimes only show some of the site content.
- Apps, like libraries or lists, are filled with document files and data.
- We can set alerts on these libraries or even on a specific item.
- We can build views on apps to filter, sort or group files or items of a library or list.
- Using webparts, we are able to pull specific views of interest to particular pages.
- With workflows, we can achieve more custom notifications and processes.

SHAREPOINT BEST PRACTICES

There are often three ways to do something in SharePoint, and with time you will gain comfort in your approach.

These basic principles hold true:
- Internet Explorer works best; with our sites listed as trusted sites (see Browser Settings)
- No spaces in file names, %20 will replace each space – Final%20Version%202016 vs Final-Version_2016
- Keep file names the same – rather than V2, V3, Final, Final-Updated, etc. let SharePoint Versioning take care
- Avoid making folders, use metadata instead
**Basic Setup**

First things first – your account, permissions, password, & browser settings. **More questions? Email admin.sp@aphl.org**

**Your APHL Account**

1. If you do not have an APHL account, visit [www.aphl.org](http://www.aphl.org) and locate the Create an Account link in our header:

2. If you have an APHL account already but need to update your email address, password, title, etc., visit [www.aphl.org/myaphl](http://www.aphl.org/myaphl) and select Edit My Account, or Change Password, from the left navigation:

**Your Permissions**

Once you have account, you need access or permissions to the sites/workspaces. The APHL staff member you work with should be able to grant you the needed access, so work with them to get permissions to the site(s) needed.

**Your Password**

If you forgot your password, from the log in page on [www.aphl.org](http://www.aphl.org), you will see a link to reset your password:
**Browser Settings**

**Add to your trusted sites**

1. From Internet Explorer (our only recommended browser for our sites), Select Tools, then Internet Options.

2. Select Security Tab click on Trusted sites and then click the Sites button.

3. Enter [https://www.aphlweb.org](https://www.aphlweb.org), Click Add and [http://www.aphl.org](http://www.aphl.org), Click Add. Also verify that “Require server verification” box is **not** selected.

**Why add our sites to your trusted sites?**

Good question. This setting allows for SharePoint credentials to flow back and forth. When you open a document, your login/password gets sent in the background, you should not see it. Without this setting you will see log in prompts where authentication may get stuck, or the browser may hang, or stop responding.
**SharePoint Security: Permission Groups**

We are all familiar with security, and probably use it every day to login securely to our computers, phones, or by means of gaining secure entry to our building, floor, or office.

SharePoint security is known as permissions, which are governed in three tiers: **Site**, **Container**, and **Item**. What this means is there are 3 levels of a site to be accessed:

- the whole **Site** (analogy: the building)
- the library **Container** of many files (analogy: the floor)
- single **Item** within the library (analogy: the office)

You might have a key to enter a building (**site**), but that key does not necessarily get you into every floor (**container/library**), or every office (**item**).

SharePoint is able to mimic the real life scenario of controlling access by user to each of the tiers, and what level of access (Read, Contribute, Full Control, etc.).

SharePoint’s best practice is to use Permission Groups to manage access, so all users in one group have the same permission as the other users in the group.

**Permission Levels**

The main levels of access are:

- **Full Control** allows user to access all options in the site, list or library.
- **Contribute** allows user to add/modify/delete.
- **Read** allows user to only consume information.

**Site Permissions**

The permission levels and access controls are generally monitored and controlled by APHL staff. If you are trying to access content but are told Access Denied or that you don’t have permission to access the content, first reach out to your APHL Staff Point of Contact with the link you’re attempting to reach.

If the APHL Staff Point of Contact has granted you access to control permissions, they will show you how to do so.
How to Find Your Sites

Now that you are set up and ready – how can you find the workspace links to the sites you have access to.

1. Go to www.aphl.org/myAPHL
2. It will ask for your login if you aren’t signed in.

3. Wait for the Workspaces section to load (found on the right), then locate your chosen site and click the link:
**SharePoint Page Breakdown**

For example only; your page(s) could include some, all or none of the below web parts. Each page is customizable, but every page has a global/top navigation bar, a space for the left/quick navigation and the search box.

**Top Navigation**
This is a global navigation bar that will take you to other pages or sub sites. You only see in the global navigation the sites you have access to.

**Left Navigation**
Also known as quick nav. This section of your page is where you can customize links for the entire site.

The Site Contents link at the bottom of the left navigation takes you to the ‘Backend’ view of the site you’re in.

**Announcements Web Part**
This web part will house all kinds of notifications for you to visit and keep posted.

**Calendar Web Part**
This web part will allow for you and your colleagues to share event information.

**Search Box**
Search box defaults to only searching the site you are on – to expand or filter the search, use the drop down arrow to adjust your selection. Expand it to search Everything or narrow it further to search People, Conversations, or This Site.

Search Box is defaulted to search the current site only (see image below for details)

**Links List Web Part**
This web part houses more links to anything you want, from reference documents to external sites.
THE RIBBON

The concept of the ribbon was first seen in Microsoft Office 2007 to expose options such as formatting, page layout and so forth, and the ribbon found its way into SharePoint; we hope you find the similarity easy to adapt to.

When working on pages, lists and libraries, different tabs will show up depending on your selection. The first tab will always be item options:

Library:

List:

The second tab will always be the container (list or library) options:

Library:

List:

Icons may be greyed out depending if an item has not been selected or if you do not have permissions for the action(s).

To hide the ribbon, click on the Browse tab:
EDITING A PAGE

There are often several pages within a site but only one is the homepage. The homepage should be thought of as the doorway to your site, easy to navigate, not over crowded, and filled with useful content to get you where is most important. The remaining pages of the site could be thought of as the additional rooms/doorways of the house that is your site. To modify any page:

Find the gears icon for the settings of the page you are to edit, upper right corner of page, to the right of your login:

Select Edit Page:

terer@aphl.org

The Ribbon then displays page editing options:

As you select various web parts or content areas of the page, different options will appear in tabs on the Ribbon:

(if there is publishing required, it will have a Publish tab as the above shows)

Once you make the changes, stop editing the page to save them, check in, or submit for publishing if required.
If you want others to see your changes before publishing, you can ‘Check it in’ without publishing it – this is not available without the check out feature turned on though.
**SharePoint Apps Overview**

There are many uses for the containers of SharePoint sites such as lists and libraries. Being able to customize them adds the benefit to the user of self-governance over their document management as a group. Depending on your permission level of the site or app, you may or may not be able to customize or build these yourself.

**Site Contents » Your Apps**

There are many uses for the containers of SharePoint sites such as lists and libraries. Being able to customize them adds the benefit to the user of self-governance over their document management as a group. Depending on your permission level of the site or app, you may or may not be able to customize or build these yourself.

**Lists**

When adding a new App to your site such as a list, SharePoint has many existing lists prebuilt ready for your data. Try searching through the Apps to see if one fits your needs before building a custom one. Below are a few examples:

**Announcements**

The announcement is a way of putting information out for those that visit the page can use, such as reminders, notices, upcoming events, deadlines, maybe quote of the week, and other content to be highlighted.

**Discussion Boards**

SharePoint’s discussion boards are great for housing conversations, debates, and run of the mill chit chat, as well as keeping it stored in a central location that is searchable.

In both of these views, finding the ‘Add new announcement’ or ‘+ new discussion’ are used to contribute a post to the list. The older 2010 style button is shown on the left with Announcements and the newer button is with Discussion Boards on the right. Open a post by clicking on the title. More information or options to reply are within the item.
**SharePoint** has a specialized list that will allow you to keep helpful links for your group to use and add to. It can be very helpful to store regularly visited resources a click away. Build it as an app, then select Add new item, the older and newer displays are shown below as you may encounter both:

2013 Links

- new link or edit this list
- URL
  - netFORUM - Change/forgot password
  - netFORUM - Live External site (web)
  - netFORUM - Live Internal Database (web)
  - netFORUM - Test database
  - netFORUM - Test External site
  - netFORUM - Videos about modules
  - netFORUM - Wiki
  - SharePoint - Forgot Password

**Task List**
The Task is a great tool to help with coordination and accountability, keeping track with status and percent complete. You can use Predecessors to assign task order.

<table>
<thead>
<tr>
<th>Title</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Start Date</td>
<td>12/3/2013</td>
</tr>
<tr>
<td>Assigned To</td>
<td></td>
</tr>
<tr>
<td>% Complete</td>
<td></td>
</tr>
<tr>
<td>Description</td>
<td></td>
</tr>
<tr>
<td>Predecessors</td>
<td></td>
</tr>
<tr>
<td>Priority</td>
<td></td>
</tr>
<tr>
<td>Status</td>
<td></td>
</tr>
<tr>
<td>Due Date</td>
<td></td>
</tr>
</tbody>
</table>
LIBRARIES

When we need to share or collaborate on a file, a library on SharePoint is the best place for it. We can store metadata that comes prebuilt in a library app or customize columns to build storage for other metadata. You can easily store many documents in one library, managing the status of the files and keeping track of who last worked on it, in a central location where everyone can access it. Being able to send a link to the file instead of attaching to an email is wonderful.

UPLOADING A FILE

1. Click on the Files tab in the ribbon, then click Upload Document or click on ‘+ new document’ above the files. You will be prompted to browse for file or can choose to ‘Upload files using Windows Explorer instead’

New to 2013 SharePoint, you can drag multiple files into the library using the file explorer or from your desktop:
CHECK OUT/ CHECK IN

This feature is best to have turned on when using versioning and needing to manage who is working on a document or webpage. If a file is checked out to you, it creates a version of the file only you can see until you check it in. If others open a file checked out to you, they will not see what you see and will not be able to edit the document.

If users are using Microsoft Office 2010 or later, there is a cool feature called co-authoring, which allows multiple users to edit the same document (Word, PowerPoint, Excel Online) at the same time, to see the other’s changes live on refresh and work collaboratively in the moment. The Check Out feature cannot be used with co-author.

WITH THE RIBBON

Select the checkmark next to the document, the ribbon will open the files tab, then click Check Out. If you try to Edit Document, you will be prompted to check out the file first if this feature is in use. Check In displays after checking out.

WITH THE ELLIPSES

When viewing files in the Default View, there is an ellipsis next to each file name. Clicking on the three dots provides basic info and options on the document, with another ellipsis for more options. After clicking on the second set of the three dots, you can see Check Out here, and will only see the Check In option if the document is already checked out.
KEEPING YOUR LIBRARY ORGANIZED

After uploading documents you need to label, or tag, them appropriately with metadata by editing the Properties. Keep file names without spaces, use the Title field for naming with spaces as seen below. If Check Out/In is enabled, remember to Check In the files when you are done. Files won’t save unless all required property fields are completed.

1. Use the checkmark to the left of the file name and select the Edit Properties in the ribbon:

If you hit Edit Document instead, it will think you want to modify the file itself and open the file to edit.

2. Below is a view of the form that pops up with properties to edit in order to manage the metadata of the file. Please note that the fields below may be different from what you see as each library can be unique.

Shared Documents - Adding_a_Fiscal_Year.docx

Name: Adding_a_Fiscal_Year
Title: Adding a Fiscal Year
Subject: netFORUM
Description: How to add a new fiscal year to netFORUM

Version: 1.0
Created at 3/27/2013 3:54 PM by APHLUser.melissavonhatten@aphl.org
Last modified at 3/27/2013 3:54 PM by APHLUser.melissavonhatten@aphl.org
**Alerts**

SharePoint allows you to set up automatic updates for content of interest. You may set Alerts for yourself and others.

**Setting an Alert on an Individual Item/File**

1. Use the check mark to select your file or item, then from the Files/Items tab in the ribbon click on the Alert Me icon, then select Set alert on this document.

   *Note: If you haven’t selected an item or file, it will be greyed out and unavailable to select.*

2. Fill out the form:

   *Alert Title* – this becomes the subject line, default for an item/file is the container name and item name

   *Send Alerts To* – this defaults to your own email address, which you can remove; but you can also add other users registered in the system.

   *Delivery Method* – Email or Text (SMS) option

   *Send Alerts for These Changes* – many options as to what changes to be alerted on, be mindful if setting alerts for others and keep it more generic for a larger group. **Note: even if you set an Alert for someone, they have control over whether they continue to receive Alerts or not.**

   *When to Send Alerts* – immediately is most common, but you can opt for daily or weekly summaries and even specify the day of week and time of day for the summaries.
**SETTING AN ALERT ON THE CONTAINER (LIBRARY/LIST)**

1. From the Library or List tab in the ribbon click on the Alert Me icon, then select the Set alert on this library.

2. Again fill out this form, same options as before, with the additional Change Type Setting added, this allows for you to select all changes to all documents, only new items, only existing, or when things are deleted.

### SharePoint

![SharePoint ribbon with alert settings]

**Send Alerts To**

You can enter user names or e-mail addresses, separate them with semicolons.

![User input field for alert recipients]

**Delivery Method**

Specify how you want the alerts delivered.

**Send me alerts by:**

- E-mail
- Text Message (SMS)

- Send URL in text message (SMS)

**Change Type**

Specify the type of changes that you want to be alerted to.

**Send Alerts for These Changes**

Specify whether to filter alerts based on specific criteria. You may also restrict your alerts to only include items that show in a particular view.

**Send Alerts for These Changes**

Specify whether to filter alerts based on specific criteria. You may also restrict your alerts to only include items that show in a particular view.

**When to Send Alerts**

Specify how frequently you want to be alerted. (Mobile alert is only available for immediately send)

- Send notification immediately
- Send a daily summary
- Send a weekly summary

**Time:**

- [ ] Tuesday
- [ ] 4:00 PM
CREATING A VIEW

1. From the list or library tab in the ribbon, select the icon for Create View.

2. You will have options:

- **Standard View** will give you the default columns to begin with
- **Datasheet View** will create a view similar to Excel to work directly in columns in the list or library for bulk editing
- **Calendar** will only work if you have 3 specific fields, title, start date, and end date
- **Gantt View** is a very light PM view that you can apply to a task list
- **Access View and Custom View** in SharePoint Designer should be built only by those with the software and skills necessary to work in Access and SharePoint Designer.

Since we always want to keep the native default view (All Items or All Documents) untouched, the ‘Start from an existing view’ option is a great way to build your own version of the All Documents or All Items view instead or to build other similar views quickly. You can even set a new view to be the new default of the list, but it is best practice to leave the All Items/Documents view as is.

We start with Standard View

3. Fill out the form:

   - **Under Name and Audience**, View Name, Make this the default view, and View Audience are easy options.
   - **Columns** you select to display are the beginning of creating a helpful view that allows you to display the most useful information in your custom view.
1. **Views**

- **Name**: Type a name for the view of the document store. Make the name descriptive, such as “Sorted by Author”, so that others will know what to expect when they click on the title.

- **View Format**:
  - Make this the default view
  - (Applies to public view only)

- **View Audience**:
  - Create a Personal View
  - Create a Public View
  - Public views can be shared with anyone using the site.

4. **Sort and Filter** are the next sections that help you deliver information to the View from the list easily. **Sort** organizes the list in ascending or descending order based on two columns only.

**Filter** allows many columns, if you select ‘Show More Columns...’ at the bottom right of the screen. ‘Show items only when the following is true:’ must be selected for filter to be applied.
5. The bottom of the form has several collapsed options:

- **Tabular View** will toggle your ability to work with the item checkboxes.
- **Group By** will give you the opportunity to create views grouped by columns in your list.
- **Totals** will provide basic math to your lists such as summing up, or counting the contents of a column.
- **Style** will give you a few different ways to show the content of your list.
- **Folders** should be avoided.
- **Item Limit** of the View is by default 30 per page, you can change this here, as well as not allow for paging.
- **Mobile** options should be left as is, unless specifically designing for mobile use.

![Form with options]

- **Enable this view for mobile access** (Applies to public views only)
- **Make this view the default view for mobile access** (Applies to public views only)

Number of items to display in list view web part for this view:

3

Field to display in mobile list simple view:

- **Name (linked to document with edit menu)**

Troubleshooting

There are often hiccups within a computer system, which can present as errors to users.

If you run into an error, please try to recreate the error again.

If you are able to replicate the error, please document what you did to create the error and capture the error message with either a copy and paste of the text or a screenshot. URLs are most helpful, as well as a description of actions.

E.g., When I open the file (insert URL here) I am presented with the following error message (picture or text of error)