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

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**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 SHARE POINT 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.

**SHARE POINT 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:

![Create an Account](https://example.com/image1.png)

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:

![Edit My Account](https://example.com/image2.png)

**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:

![Sign in to access more resources from APHL.org and APHLWEB.org](https://example.com/image3.png)
**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.

   ![Internet Options](image1.png)
   ![Trusted sites](image2.png)

**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.
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:

   Welcome to My APHL, APHL's member services center. From this page you can access committee resources, membership search, the Survey Resource Center, password update and other frequently used sites and services in the left menu. On the right, under workspaces are links to APHL SharePoint sites you have permission to access.

   For assistance with login, please contact admin.sp@aphl.org. For questions concerning
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:

<table>
<thead>
<tr>
<th>Sharepoint</th>
</tr>
</thead>
<tbody>
<tr>
<td>Browse</td>
</tr>
<tr>
<td>New Document</td>
</tr>
<tr>
<td>New Folder</td>
</tr>
<tr>
<td>View Item</td>
</tr>
<tr>
<td>New</td>
</tr>
</tbody>
</table>

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

Library:

<table>
<thead>
<tr>
<th>Sharepoint</th>
</tr>
</thead>
<tbody>
<tr>
<td>Browse</td>
</tr>
<tr>
<td>View</td>
</tr>
<tr>
<td>Modify View</td>
</tr>
<tr>
<td>View Format</td>
</tr>
</tbody>
</table>

List:

<table>
<thead>
<tr>
<th>Sharepoint</th>
</tr>
</thead>
<tbody>
<tr>
<td>Browse</td>
</tr>
<tr>
<td>View</td>
</tr>
<tr>
<td>Modify View</td>
</tr>
<tr>
<td>View Format</td>
</tr>
</tbody>
</table>

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:
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.

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.

LINKS
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:

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
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.
**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.

**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. 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.

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**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)