SharePoint
Reference Guide for Site Owners
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Introduction

SharePoint is a web-based program tied into Office 365 that serves as a hub for sharing information, storing files and group collaboration. This reference guide will assist site owners in establishing their site, adding site content and managing site documents.

Requesting a New Site

All SharePoint site requests begin with a TechHelp service request.

1. From your favorite browser, type techhelp.towson.edu.
2. From the Request Type drop-down, select Employee Role (Faculty, Staff, Student Workers, etc.).
3. At the next drop-down menu, select Collaboration, Video Conferencing, Skype/Lync, SharePoint.
4. At the next drop-down menu, select SharePoint.
5. At the final drop-down menu, select New Site Request.

6. In the Request Detail box, provide the following information:
   - Site Owner's Name
   - Site Owner's NetID
   - Desired Site Name
   - Desired Site Web Address e.g.: https://tu.sharepoint.com/sites/sitename
   - Type of Site: Department, Project/Team, OTS Project Site, OTS Construction Project Site

Note: Project/Team is only for sanctioned PMO projects, not projects for departments. Most SharePoint site requests are going to be the Department type. The other types are utilized for the Project Management Office directly.

7. Click the Save button. Your site request will be reviewed and then approved.

8. Once approved, you will receive an email indicating the site has been created along with the site’s web address.
Following a Site

The best way to view all of the sites that you are a member or owner of is to follow them via the SharePoint tile located in the Office 365 portal. A site must be followed in order to be added to the SharePoint tile in Office 365.

**Note:** In most cases, you will receive an email containing a link when you are added to a SharePoint site.

1. In the address bar of your favorite browser, enter the SharePoint site you wish to follow.

   **Note:** Site URL’s look like this: http://tu.sharepoint.com/sites/SITENAME.

2. Login with your Towson email address and password.

3. In the top right hand corner of the site, click the **FOLLOW** button.

4. A pop-up message will appear indicating that you are now following this site.

5. The site will appear beneath the **Following** header when you click the SharePoint tile in Office 365.
Navigation

The SharePoint screen below is a standard template that is loaded for each site.

Note: Each site can be customized according to needs. For the purpose of this reference guide, the standard Towson University template is featured.

![SharePoint Screen](image)

**Figure 4**

| 1 | **Ribbon:** Click the **Page** tab to access the ribbon for the site. The ribbon contains additional commands and settings for the site. |
| 2 | **Top Link Bar:** The top link bar is used to navigate to sub-sites and additional links. |
| 3 | **Search box:** The search box allows a user to enter a term and perform a search across the entire site. |
| 4 | **User Menu:** Allows a user to sign out or view their account information. |
| 5 | **Site Settings:** Accessing the site settings allows a user to add additional site content or customize their site. |
| 6 | **Help Icon:** Additional help on how to perform actions in SharePoint can be found here. |
| 7 | **Title Link:** This is commonly a clickable image that will navigate you back to the home page from anywhere in your site. |
| 8 | **Quick Launch Bar:** This allows a user to navigate through the items on the site and explore additional site content. |
| 9 | **Main Content Area:** This customizable area can display any lists, libraries or other content you have added to the site. |
Adding People to a Site

Adding people to a site is accomplished by sharing the site with others. There are three default permission levels:

- **Members** – Members are able to view, add, edit and update lists and libraries. This is the default permission group when sharing.
- **Owners** – Owners have full control of all available SharePoint permissions.
- **Visitors** – Visitors can view items in lists and libraries and download files.

To add people to your site:

1. Click the **SHARE** icon in the top right hand side of the site.

   ![Figure 5](image)

2. The **Share** screen appears. Type the last name or email address of the person(s) you wish to grant access to the SharePoint site.

3. To set the permission level of the invited users, click the **SHOW OPTIONS** link.

   ![Figure 6](image)

4. Select the desired permissions level from the **Select a permission level** drop-down menu. **Note:** If you add multiple email addresses in the box provided, the permission level chosen in this step will apply to all email addresses.

5. Click the **Share** button.

   ![Figure 7](image)
Removing People from a Site

If you need to remove a person from a site, you can do that from the Site Settings screen.

1. From the main SharePoint screen, click the Site Settings gear icon and then select Site Settings from the drop-down menu.

   ![Site Settings](image)

   **Figure 8**

2. Beneath the Users and Permissions heading, select People and groups.

   ![Users and Permissions](image)

   **Figure 9**

3. Place a checkmark beside the name(s) of the person(s) you wish to remove from the site.

4. From the Actions drop-down, select Remove Users from Group.

   ![Remove Users from Group](image)

   **Figure 10**

5. A message box will appear confirming the removal of the user(s). Click the OK button to proceed.
**Lists and Libraries**

Lists and libraries are the foundation of a SharePoint site's organization. Most everything in SharePoint is either a list or a library.

Lists house data in tables, much like an Excel spreadsheet. There are rows and columns. The information in your lists can be sorted, searched and filtered. Examples of lists in SharePoint are **Announcements, Contacts, Links, Calendar** and **Tasks**. Custom lists can also be created.

Libraries have a similar function as lists, however, libraries are repositories for site users to create, upload, collaborate and edit files. Think of it as a network share in the cloud that can be accessed anywhere with an internet connection without the need for a VPN. With 10 GB of storage and extensive permission controls, libraries can be created in SharePoint to store documents, forms, pictures and more.

**Managing Lists**

Site content is the actual material that you add to the site and share with the group. Content is classified as either lists or libraries. Lists are used to store and organize communication and collaboration information.

The default lists in SharePoint are: **Announcements, Calendars** and **Tasks**.

**Adding a New Announcement**

**Announcements** in SharePoint give you the ability to disseminate news with your SharePoint site members.

1. From the **Quick Launch Bar**, select the **Announcements** link.

![Figure 11](image1.png)

2. The **Announcements** screen will appear. Click the **+New** button.

![Figure 12](image2.png)

3. The **New item** form will appear. Add a **Title**, **Body** text, the date the message **Expires** (if necessary) and then click the **Save** button.
Adding a New Calendar Entry

The Calendar in SharePoint provides site members the ability to keep track of important dates, meetings and events.

1. From the Quick Launch Bar, select the Calendar link.

![Quick Launch Bar with Calendar highlighted](image1.png)

Figure 13

2. Click in the date box that you wish to add an entry and then click the +Add link that will appear.

![Calendar entry screen](image2.png)

Figure 14

3. The Calendar – New Item screen will appear. Fill out the appropriate fields and then click the Save button.

![Calendar – New Item screen](image3.png)

Figure 15
Syncing a SharePoint Calendar with Outlook

SharePoint calendars can be connected to Outlook. Adding or removing calendar entries via Outlook will sync to the SharePoint calendar.

1. From the Quick Launch Bar, select the Calendar link.
2. Click the Calendar tab in the ribbon and then click the Connect to Outlook icon located in the Connect & Export group.

3. Your browser may display a pop-up message requesting permission to open Outlook. Click the Open Outlook 2016 button.

4. Outlook will display a pop-up message requesting your permission to connect to the SharePoint calendar. Click the Yes button.
5. The calendar will open in Outlook and will be located beneath the Other Calendars heading.
Adding a Task

Tasks in SharePoint are items that can be assigned to specific members of the site. The members that are assigned tasks can update the progress. Tasks provide a great way to keep track of projects.

1. From the Quick Launch Bar, select the Tasks link.

![Figure 18](image)

2. The Tasks screen appears. Click +new task to add a new task to the list.

![Figure 19](image)

3. Complete the task entry form and then click the Save button to create the task.

![Figure 20](image)
Working with Files

The documents library is the central location from which users can update and manage files. SharePoint is integrated with the Office365 suite of programs. Documents can be created from within SharePoint, uploaded to SharePoint or saved from Office to SharePoint.

Creating a New File in SharePoint

1. From the Quick Launch Bar, click the Documents link.
2. In the Documents library, click the New button.
3. Choose the file type you wish to create from the drop-down menu.
4. The online version of the app will launch in Office 365.
5. Add content as you would normally.
6. Click the default file name in the title bar to change the name of the file.
7. Type a new file name in the field and press the Enter key. The file has now been renamed.
8. Closing the application, or selecting SharePoint from the App Launcher will bring you back to SharePoint.
9. The file will appear in the Documents library. You may have to refresh the page before it appears.
Uploading Files to SharePoint

Folders, documents and other Microsoft Office files that are on your computer can be uploaded and stored in SharePoint. There are two choices for uploading to your SharePoint site:

- Files – Upload a single file or multiple files via a file browser.
- Folder – Upload an entire folder from your computer to SharePoint via a folder browser.

Uploading a File

1. From the **Quick Launch Bar**, click the **Documents** link.
2. In the **Documents** library, click the **Upload** button.
3. Select **Files** from the drop-down menu.

![Figure 24](image)

4. The **Open** window will appear.
5. Select the file or files you wish to upload and then click the **Open** button.
6. After uploading, the file will appear in the documents library. If you do not see it, refresh your browser page.

**Note**: Dragging files to the documents library will upload them to SharePoint as well.

![Figure 25](image)
Uploading a Folder

1. From the Quick Launch Bar, click the Documents link.
2. In the Documents library, click the Upload button.
3. Select Folder from the drop-down menu.

![Folder selection](image1)

Figure 26

4. The Select Folder to Upload window will appear.
5. Navigate to and select the folder you wish to upload and click the Upload button.

![Folder upload](image2)

Figure 27

6. You will receive a notification in your Documents library when the files have finished uploading.

![Upload notification](image3)

Figure 28

7. After uploading, the folder will appear in the documents library. If you do not see it, refresh your browser page.

**Note:** Dragging folders to the documents library will upload them to SharePoint as well.
Deleting a File

Files can be deleted from SharePoint. Deleted files are moved to the site’s Recycle Bin.

1. From the Quick Launch Bar, click the Documents link.
2. In the Documents library, click beside the file or files you wish to delete. A check mark will appear.

3. Click the Delete icon in the in the Documents library ribbon.

4. A confirmation window will appear. Click the Delete button.

5. A notification will appear when the files have been deleted.
Using the Recycle Bin

By default, items are kept in the Recycle Bin for 93 days before they are automatically moved to the Second-Stage Recycle Bin. Once the files are in the Second-stage Recycle Bin, they are kept for an additional 93 days before they are permanently deleted. Site owners can access the Second-Stage Recycle Bin. All other site members only have access to the initial Recycle Bin. **Note:** There is no automatic backup of SharePoint sites so pay close attention to deleted files.

1. From the **Quick Launch Bar**, click the **Recycle Bin** link.
2. In the **Recycle Bin**, click beside the file or files you wish to manage. A check mark will appear.

   ![Recycle bin](image)

   **Figure 33**

3. To restore selected files, click **Restore**.
4. To delete selected files permanently, click **Delete**.

   ![Recycle bin](image)

   **Figure 34**
Sharing

Files or folders housed in SharePoint can be shared only with people inside Towson University using the share screen.

Note: Only site owners can remove users from a shared file or folder.

Sharing Files

1. In the Quick Launch Bar, click the Documents link.
2. In the Documents library, click the corresponding More button for the file you wish to share.
3. From the More menu, click Share.

4. The Send Link screen appears. Click the People you specify can edit menu to adjust editing permissions.

5. Select one of the following permission levels:
   a. People in Towson University with the link: Creates a link that allows anyone within Towson University who are signed into Office 365 or SharePoint the ability to access the file or folder.
   b. People with existing access: Creates a link that can be used by people who already have access to the file or folder. This is normally used if you wish to resend the link to someone who already has access.
   c. Specific people: This is the default setting, which enables you to only share with people you choose.

6. Uncheck the Allow editing box if you wish to allow the recipients to only have the ability to view the file.
7. Click the Apply button. You will be returned to the Send Link window.
8. In the **Enter a name or email address** field, type the name or email address of the person(s) with whom you wish to share the document.

**Note:** this field is tied into Towson University’s active directory, so typing the recipient’s last name will generate a list of possible recipients to choose from.

9. Click the **Send** button.

![Send Link]

*Figure 38*
Creating an Alert

An alert allows a user to track items in SharePoint. Once an alert is created, the user will receive an email notification whenever that item in SharePoint is updated or deleted. Alerts can be created for pages, lists, list items libraries, files and OneNote notebooks.

**Note:** Alerts cannot be sent via text message.

Creating Alerts for Pages

Creating an alert for a page enables you to receive a notification any time the page is edited. The default page in Towson University’s SharePoint environment is Home. To create an alert for the Home page:

1. Navigate to the **Home** page by clicking **Home** in the **Quick Launch Bar**.
2. Click the **Page** tab in the ribbon.
3. Click the **Alert Me** icon.
4. From the **Alert Me** drop-down menu, click **Set an alert on this page**.
5. The **New Alert** screen appears. Adjust the following to your preference:
   - **Alert Title** – This is the name of the alert.
   - **Send Alerts To** – In the Users field, type the site member’s TU email address.
   - **Delivery Method** – This option cannot be changed.
   - **Send Alerts for These Changes** – This section enables you to choose what type of changes will trigger an alert.
   - **When to Send Alerts** – Here, you can choose how often you would like to receive alerts.

6. Click the **OK** button.

![New Alert Screen](image.png)  
**Figure 42**
Creating Alerts for Lists

Creating an alert for a list will notify you of any changes to items within that list. The default lists in the Quick Launch Bar of SharePoint are **Announcements**, **Calendar** and **Tasks**.

**Creating an Alert for Announcements**

To create an alert for the **Announcements** list:

1. From the **Quick Launch Bar**, select **Announcements**.

   ![Figure 43]

2. In the ribbon, click the **More** button and then click on **Alert me**.

   ![Figure 44]

3. The **New Alert** screen appears. Follow steps 5 and 6 on page 21 to set an alert.

**Creating an Alert for the Calendar**

To create an alert for the **Calendar** list:

1. From the **Quick Launch Bar**, select **Calendar**.

   ![Figure 45]
2. Click the **CALENDAR** tab in the ribbon.

3. Click the **Alert Me** button and then select **Set alert on this list** from the dropdown menu.

![Figure 46](image)

4. The **New Alert** screen appears. Follow steps 5 and 6 on page 21 to set an alert.

**Creating an Alert for the Tasks List**

To create an alert for the **Tasks** list:

1. From the **Quick Launch Bar**, select **Tasks**.

![Figure 47](image)

2. Click the **LIST** tab in the ribbon.

3. Click the **Alert Me** button and then select **Set alert on this list** from the dropdown menu.

![Figure 48](image)

4. The **New Alert** screen appears. Follow steps 5 and 6 on page 21 to set an alert.
Creating Alerts for List Items

List items are anything contained within a list of your SharePoint site. These items could be an announcement, calendar entry or task.

**Note:** Creating an alert for a calendar entry is slightly different from the method for announcements and tasks.

**Alerts for Announcements**

1. Click on **Announcements** in the **Quick Launch Bar**
2. In the **Announcements** screen, place a check mark beside the item you wish to create an alert.
3. From the ribbon, click the **More** button and then click **Alert Me**.

![Figure 49](image1.png)

4. The **Alert me when items change** window appears. Follow steps 5 and 6 on page 21 to set an alert.

**Alerts for Tasks**

1. Click on **Tasks** in the **Quick Launch Bar**
2. In the **Tasks** screen, click beside the item you wish to create an alert. A checkmark will appear.
3. Click the **Tasks** tab in the ribbon and then click the **Alert Me** icon.
4. In the **Alert Me** drop down menu, click **Set alert on this item**.

![Figure 50](image2.png)

5. The **New Alert** window appears. Follow steps 5 and 6 on page 21 to set an alert.
Alerts for Calendar Entries

1. Click on Calendar in the Quick Launch Bar.

2. Navigate to the desired calendar entry and click on the entry's title.

3. In the ribbon, click the View tab and then click the Alert Me icon.

4. The New Alert screen appears. Follow steps 5 and 6 on page 21 to set an alert.

Creating Alerts for Libraries

Creating an alert for a library will notify you of any additions or changes to items within that library. The default library in the Quick Launch Bar of SharePoint is Documents. To create an alert for the documents library:

1. From the Quick Launch Bar, click the Documents link.

2. Click on the More button in the Documents library, then click Alert me.

3. The New Alert screen appears. Follow steps 5 and 6 on page 21 to set an alert.

Creating Alerts for Library Items

Library items are anything contained within a library of your SharePoint site. The default library in SharePoint is Documents.

1. From the Quick Launch Bar, click the Documents link.

2. In the Documents library, place a check mark beside the item you wish to create an alert.
3. From the ribbon, click the **More** button and then click **Alert Me**.

4. The **New Alert** screen appears. Follow steps 5 and 6 on page 21 to set an alert.

### Creating Alerts for SharePoint OneNote Notebooks

OneNote notebooks tied to your SharePoint site are a great way to collaborate with coworkers. These notebooks have various functions across all Microsoft Office applications to enhance your notes. To set an alert on your SharePoint OneNote notebook:

1. Click **Site Contents** in the **Quick Launch Bar**.
2. In the **Contents** section, click on the **Site Assets** folder.

3. In the **Site Assets** screen, click beside the item you wish to create an alert. A checkmark will appear.

4. From the ribbon, click the **More** button and then click **Alert Me**.

5. The **New Alert** screen appears. Follow steps 5 and 6 on page 21 to set an alert.