

SharePoint

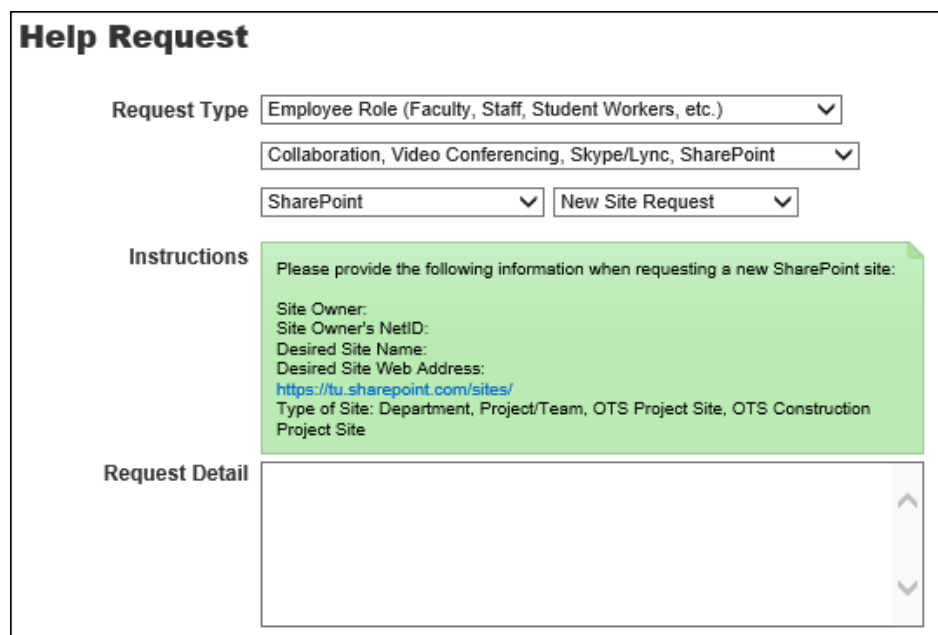
File Share Site

Introduction

The SharePoint File Share site is used to store files for a department or group. This is a unique site because permissions are handled through the group management tool and not directly through the site. These sites are a repository for departmental, or custom share files.

Requesting a SharePoint File Share Site

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**.



The screenshot shows a 'Help Request' form with the following sections:

- Request Type:** Three dropdown menus. The first is set to 'Employee Role (Faculty, Staff, Student Workers, etc.)', the second to 'Collaboration, Video Conferencing, Skype/Lync, SharePoint', and the third to 'SharePoint'.
- Request Action:** A dropdown menu set to 'New Site Request'.
- Instructions:** A green box containing the text: 'Please provide the following information when requesting a new SharePoint site: Site Owner: Site Owner's NetID: Desired Site Name: Desired Site Web Address: <https://tu.sharepoint.com/sites/> Type of Site: Department, Project/Team, OTS Project Site, OTS Construction Project Site'.
- Request Detail:** A large text input area with a vertical scrollbar on the right side.

Figure 1

6. In the **Request Detail** box, provide the following information:
 - Site Owner's Name(s)
 - Site Owner's NetID
 - Desired Site Name
 - Desired Site Web Address e.g.: <https://tu.sharepoint.com/sites/sitename>
 - Type of Site: File Share
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 the sites that you are a member or owner of is to follow them via the SharePoint tile located in the Office 365 portal. You must follow a site for it to be added to your SharePoint tile in Office 365.

1. In the address bar of your favorite browser, enter the File Share SharePoint site you wish to follow. Example Site URL: <http://tu.sharepoint.com/sites/SITENAME>.

Note: When your site has been created, the techhelp ticket will be updated with the site's URL.

2. Login with your Towson email address and password.
3. In the top right-hand corner of the site, click the **Not following** button in the upper right hand corner in order to change to **Following**.

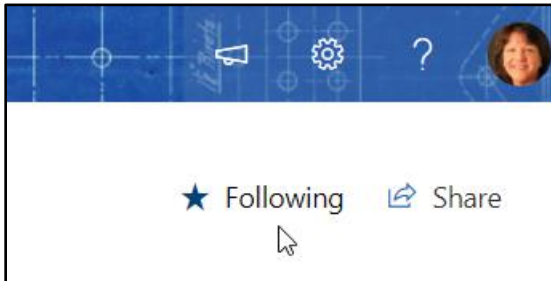


Figure 2

4. The new site will then appear beneath the **Following** header when you click the **SharePoint** tile in Office 365.

Working with Files

The document library is the central location from which users can update and manage files. The first link on the left is your document library (named "Your Site Name" Share). In the screen capture below, the document library is named **OTS Training Share**. 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. Click "**Your Site Name**" **Share** in the left navigation.
2. Click the **New** button.

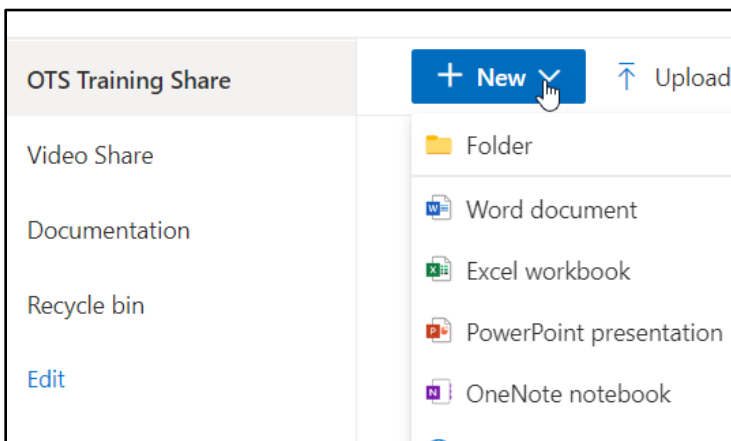


Figure 3

3. Choose the file type you wish to create from the drop-down menu (Word, Excel, etc.)
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. In the **File Name** box type a new name for the file and press ENTER.

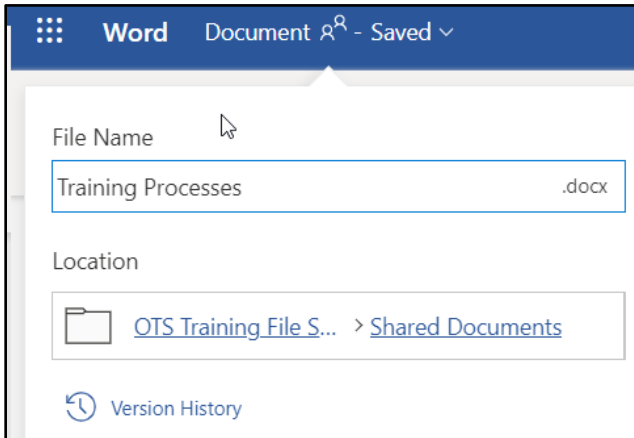


Figure 4

7. Closing the application or selecting SharePoint from the App Launcher will bring you back to SharePoint.
8. The file will appear in the **Document** library. You may have to refresh the page before it appears.

Uploading Files to SharePoint

Folders, documents, and other files 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
- Folder – Upload an entire folder

Uploading a File

Note: In addition to the steps below, you may also drag files to the document's library.

1. Click "**Your Site Name**" **Share** in the left navigation.
2. Click the **Upload** button.
3. Select **Files** from the drop-down menu.

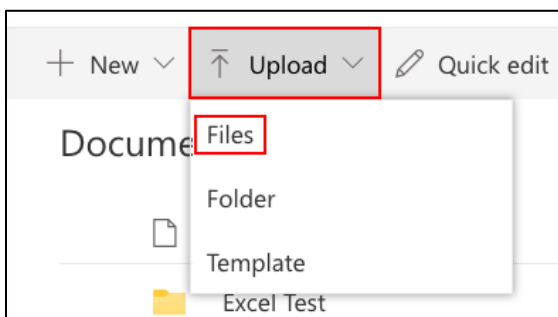


Figure 5

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

Uploading a Folder

Note: In addition to the steps below, you may also drag folders to the document's library.

1. Click "**Your Site Name**" **Share** in the left navigation.
2. Click the **Upload** button.
3. Select **Folder** from the drop-down menu.

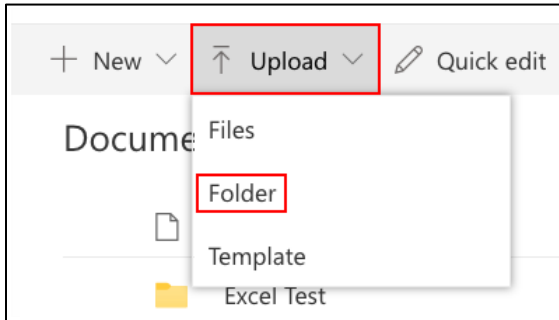


Figure 6

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.

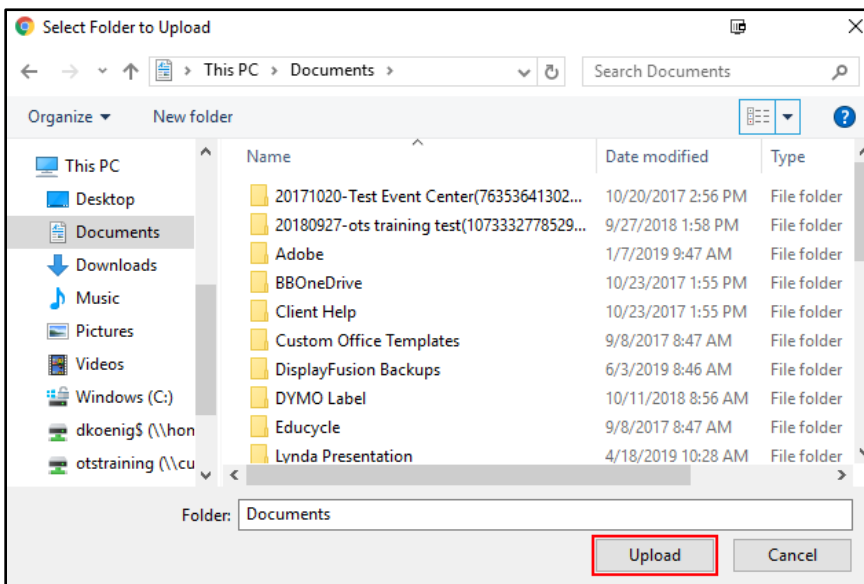


Figure 7

6. You will receive a notification in your **Document** library when the folder has finished uploading.

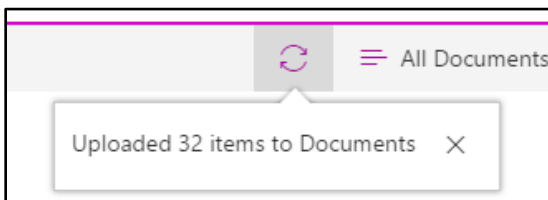


Figure 8

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

Deleting a File

Files have several levels of deletion in SharePoint. Deleted files are moved to the site's **Recycle Bin**.

1. Click "**Your Site Name**" **Share** in the left navigation.
2. Click beside the file or files you wish to delete. A **check mark** will appear.

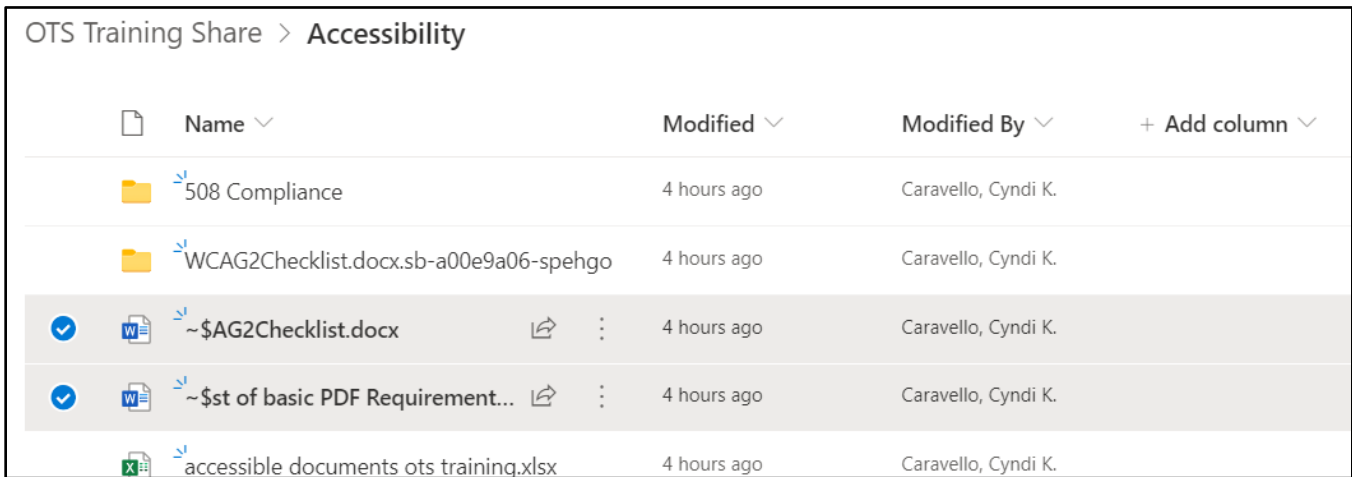


Figure 9

3. Click the **Delete** icon in the **Document** library ribbon.

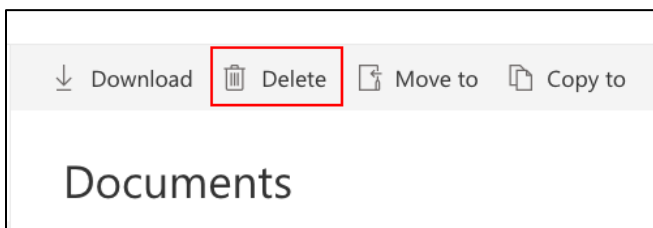


Figure 10

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

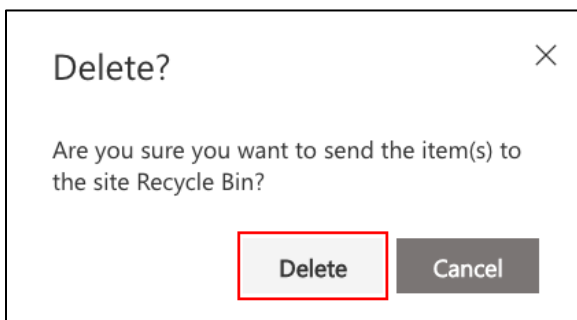


Figure 11

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

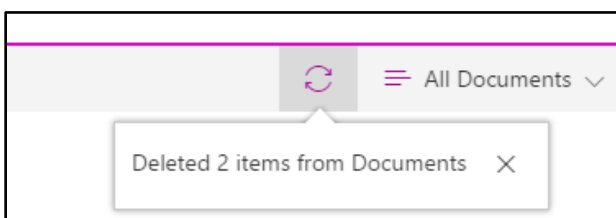


Figure 12

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 left navigation 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.

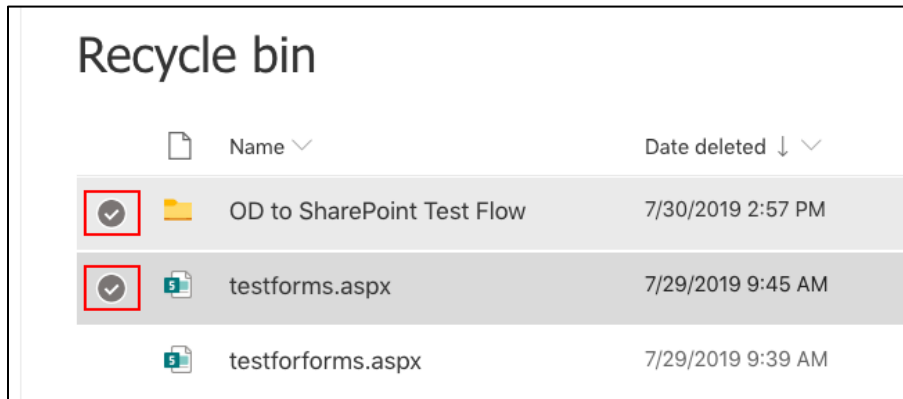


Figure 13

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

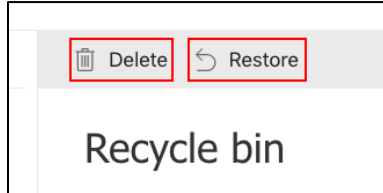


Figure 14

Adding a New Library and Adding to Left Navigation

1. Click the **Gear**.
2. Click **Add an app**.

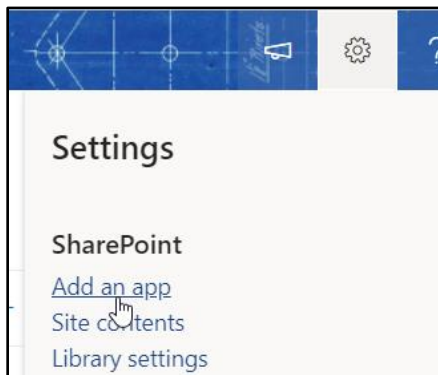


Figure 15

3. Choose **Document Library**.
4. Give the library a name and click **Create**.

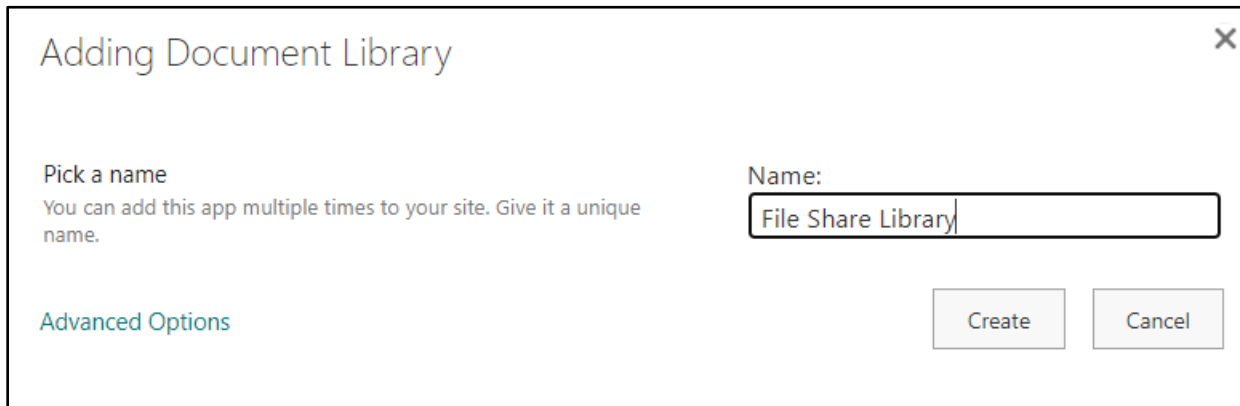


Figure 16

5. Click **Show Actions** (3 dots) beside the library you just created and click **Settings**.
6. Click **List name, description and navigation**.
7. Beside **Navigation**, click **Yes** under **Display this document library on the Quick Launch**.
8. Click **Save**.
9. You will see your new document library on the left navigation.

Managing Permissions through the Group Management Tool

The Group Management Tool is a web-based tool accessible from any browser. When your SharePoint site is created, group membership is also created in the tool. This is where the owner(s) of the site goes to add and remove permissions to the SharePoint site.

There are two types of permission groups for each SharePoint File Share Site.

- Read Only
- Read Write

1. Visit **towson.edu/netid** from your preferred browser.
2. Select **Manage** Sponsored Group Membership from the **Other Faculty/Staff NetID Tools** section. A login screen will appear.

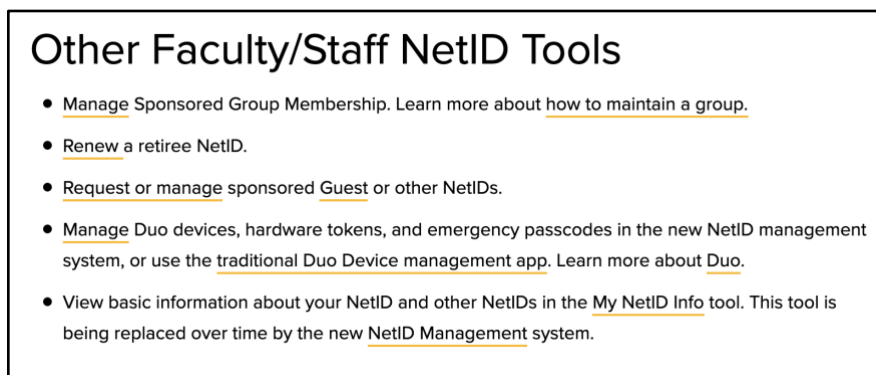


Figure 17

3. Enter your **NetID** and **Password** and click the **Login** button.

4. The **Sponsored Group Management Tool** page will appear.

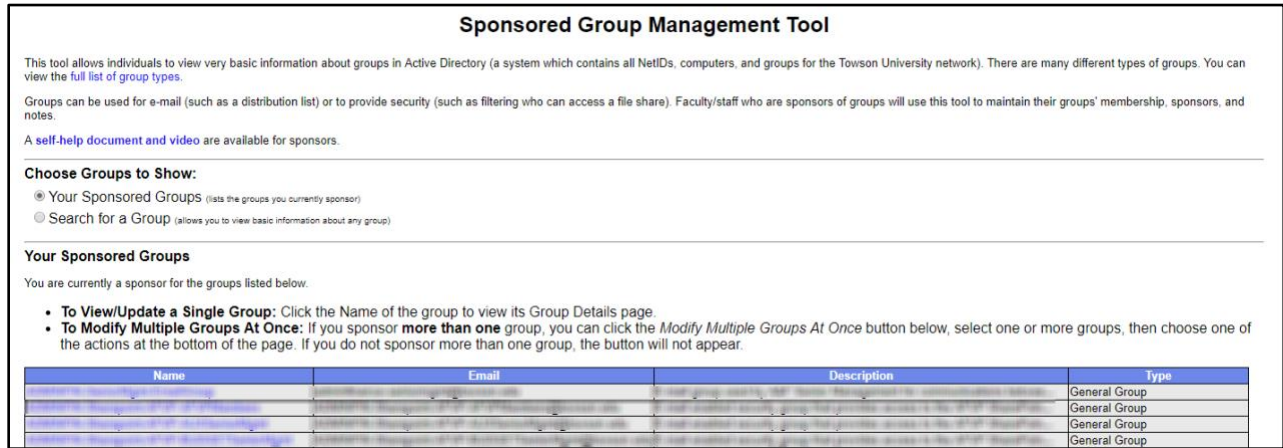


Figure 18

Modifying Your FileShare Permissions

A sponsored group can be modified by adding additional sponsors (administrators) or adding members to the group. There are two groups for every file share: ReadOnly (can view files only) and ReadWrite (can modify files).

Selecting the FileShare Group Group

- To view or update the file share group permissions, find and click on the group named **SHAREPOINT-Your Site Name SharePoint FileShare**. Choose which group you wish to modify ReadOnly or ReadWrite.

SHAREPOINT-OTSTRAININGFileShare-ReadOnly	SHAREPOINT-OTSTRAININGFileShare-ReadOnly@towson.edu
SHAREPOINT-OTSTRAININGFileShare-ReadWrite	SHAREPOINT-OTSTRAININGFileShare-ReadWrite@towson.edu

Figure 19

- The **Sponsored Group Details** page appears. Here you can email yourself a group summary report, add or remove a sponsor, add or remove a group member, update notes used to store additional details about the purpose and usage of the group and add an audit note (if the group is marked sensitive).

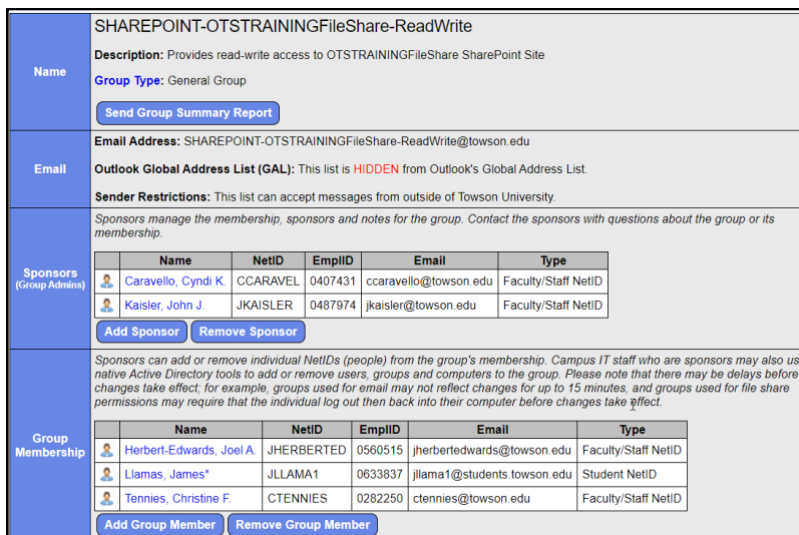


Figure 20

Adding a Sponsor (Group Administrator)

OTS recommends that each group have at least 2-3 sponsors to help facilitate group management. Only group administrators can add other sponsors (group admins) to the SharePoint site.

1. Click the **Add Sponsor** button in the **Sponsors (Group Admins)** section.

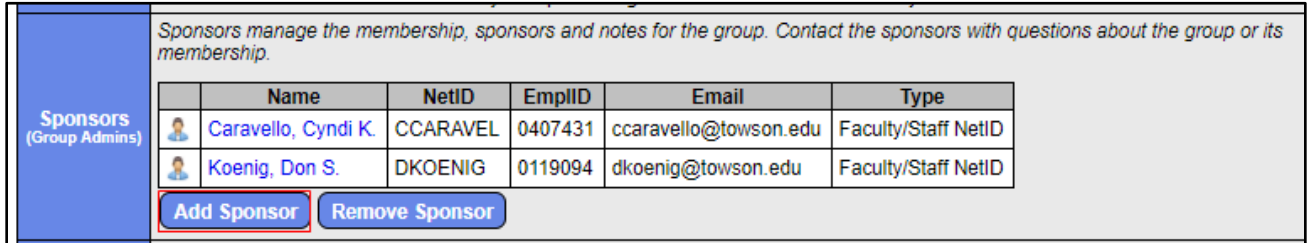


Figure 21

2. The **Add a Sponsor** window will appear. Here you can **Search by NetID, email, TUID# or last name**.
3. Input the information you need and click the **Search** button.

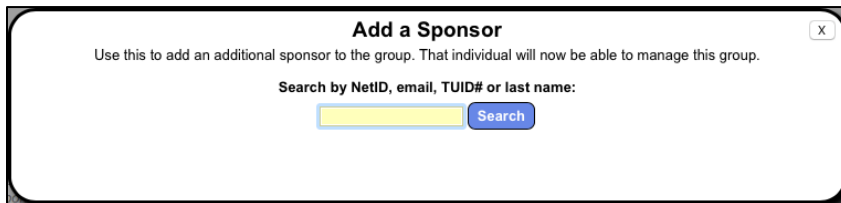


Figure 22

4. Select the name or names you wish to add and click **Add Selected Sponsor(s)**.

Note: Be sure to select the correct name as many people may have more than one entry in Active Directory (such as individuals who are both a student and faculty/staff member. The type of NetID will be displayed in the right-hand column of the list.).

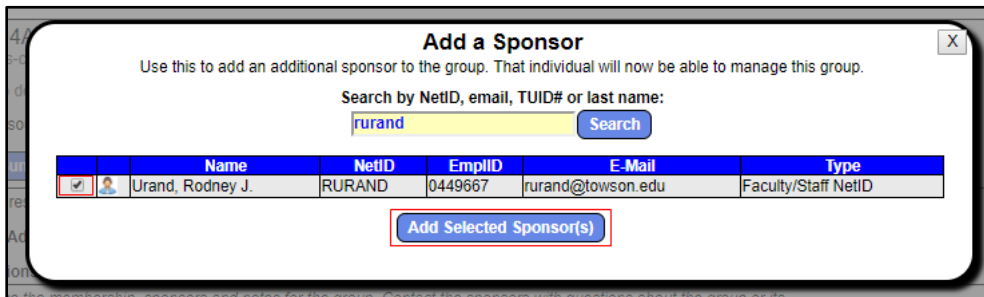


Figure 23

5. The sponsor is then added to the group. Click the **Click here to close this dialog box link**. You will be returned to the **Sponsored Group Details** screen.

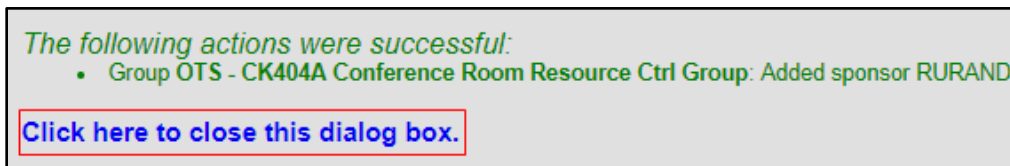


Figure 24

Removing a Sponsor

- From the **Sponsored Group Details** page, click the **Remove Sponsor** button.

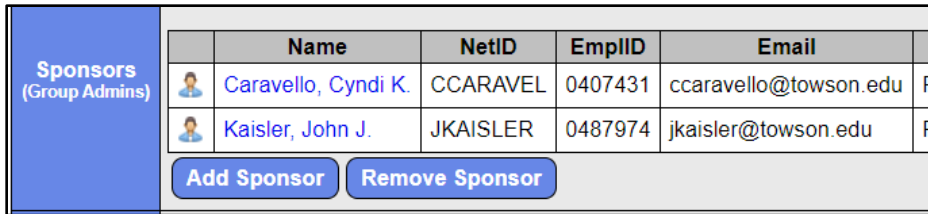


Figure 25

- Select one or more sponsors to remove by clicking the check box beside the corresponding name and then click the **Remove Selected Sponsor(s)** button.

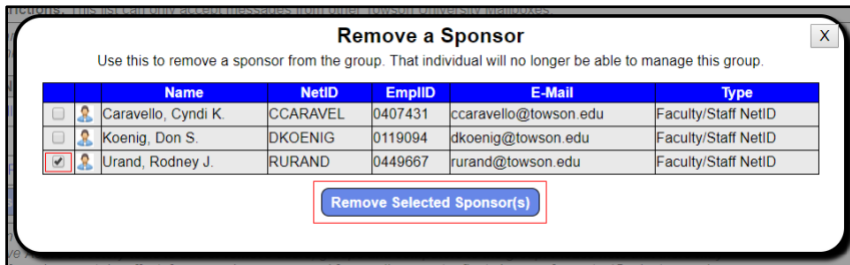


Figure 26

- Click the **Click here to close this dialog box** link. You will be returned to the **Sponsored Group Details** screen.

Adding a Group Member

- Click the **Add Group Member** button in the **Group Membership** section.

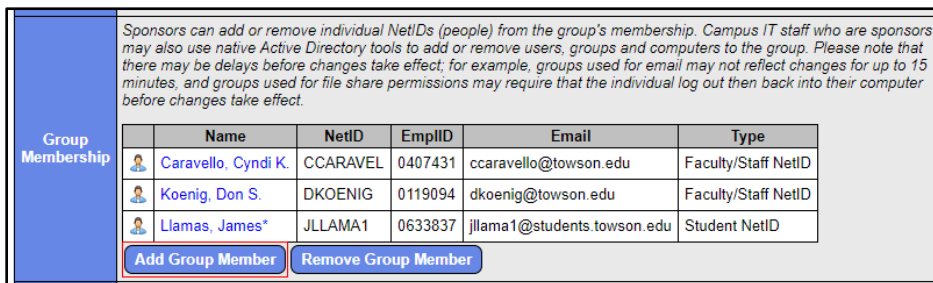


Figure 27

- Input the search information you need and click the **Search** button.
- Select the name or names you wish to add by clicking the check box beside the corresponding name and then click the **Add Selected Group Member(s)** button.
- The member is then added to the group. Click the **Click here to close this dialog box** link. You will be returned to the **Sponsored Group Details** screen.

Removing a Group Member

- From the main screen, click the **Remove Group Member** button.
- Select one or more group members to remove by clicking the check box beside the corresponding name and then click the **Remove Selected Group Member(s)** button.
- The member is removed from the group. Click the **Click here to close this dialog box** link. You will be returned to the **Sponsored Group Details** screen.