

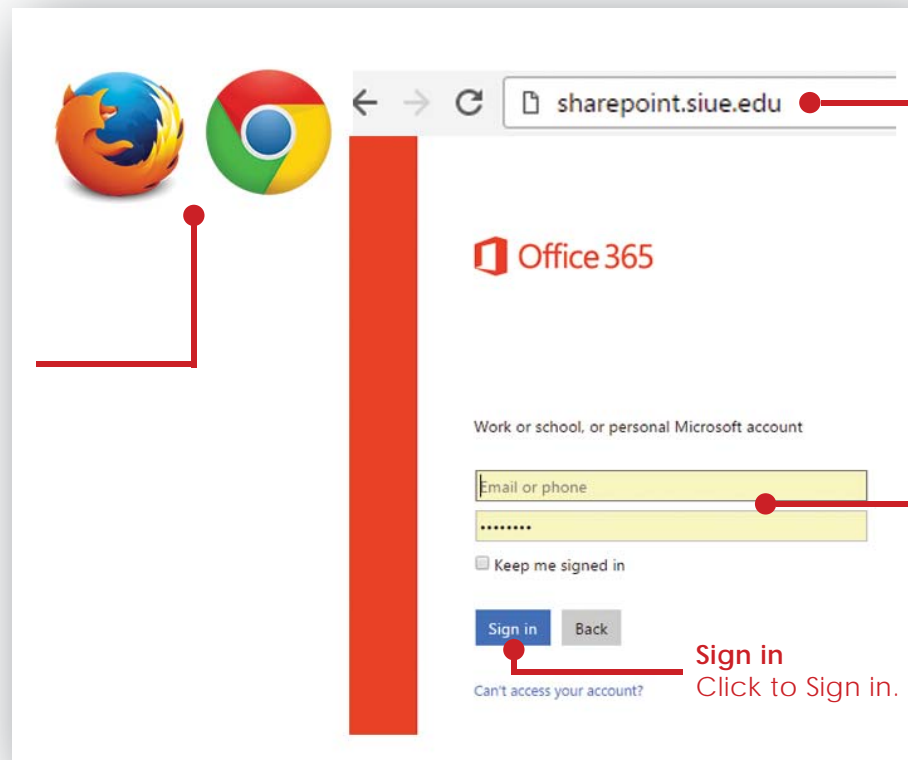
Quick Reference Guide for Site Admins

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SharePoint

Log In



Browser
Firefox and Chrome
are preferred.

URL
Enter this URL in the address bar.

Credentials
Username: @siue.edu email address
Password: e-ID password

Sign in
Click to Sign in.

SharePoint



Request a Site

The screenshot shows the 'Site Request' form in the SIUE SharePoint environment. The form includes a left-hand navigation menu and a main content area with several input fields. Red callout lines point from text labels to specific parts of the interface.

Site Name
Name your site.

Site Description
Briefly describe your site.

Site Collection
Select the collection where the new site will be housed.

Site Template
Select **Standard Template**.

Site Request
Click **Site Request** under the **Information** section to view the site request form.

Request a New Site: Add Users

Security Groups

Add users to the site with different permission levels.

Security Groups...
 Send Email to all users

Site Admins*
Admins have the permission to add/remove users to the site, upload/download/delete documents, lists and discussion items. They can also edit the look and navigation of the site.

enter eID

Site Assistants...
Assistants have the permission to upload/download/delete documents, lists and discussion items. They cannot add/remove users.

enter eID

Site Members...
Members have the permission to upload/download documents, and post to lists and discussions. They cannot delete content from the site.

enter eID

Site Visitors...
Visitors have the permission to view the site and download documents. They cannot upload content or post to the discussions.

enter eID

Add Users

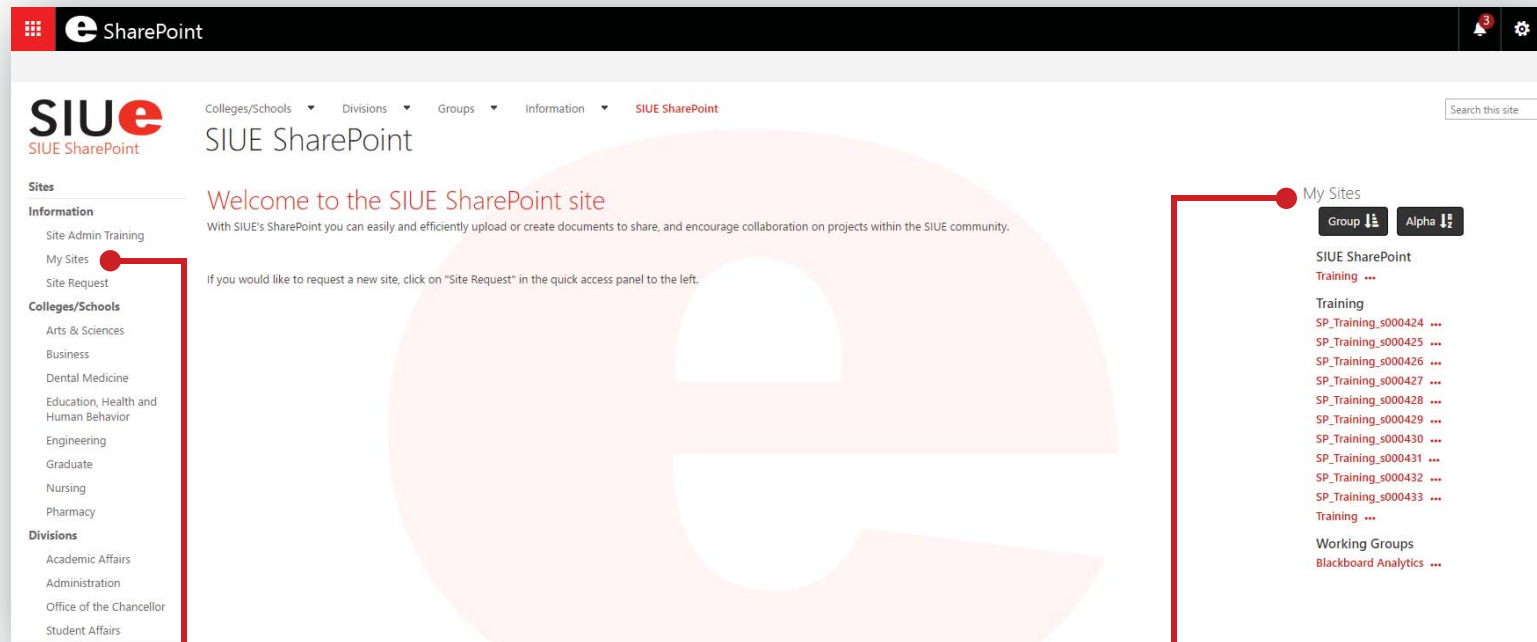
Determine the level of access the user should have (Admin, Assistant, Member, Visitor), enter their eID in the appropriate box and click add.

SharePoint



View Your Sites

There are two ways to view your sites



My Sites

Click **My Sites** in the left navigation.

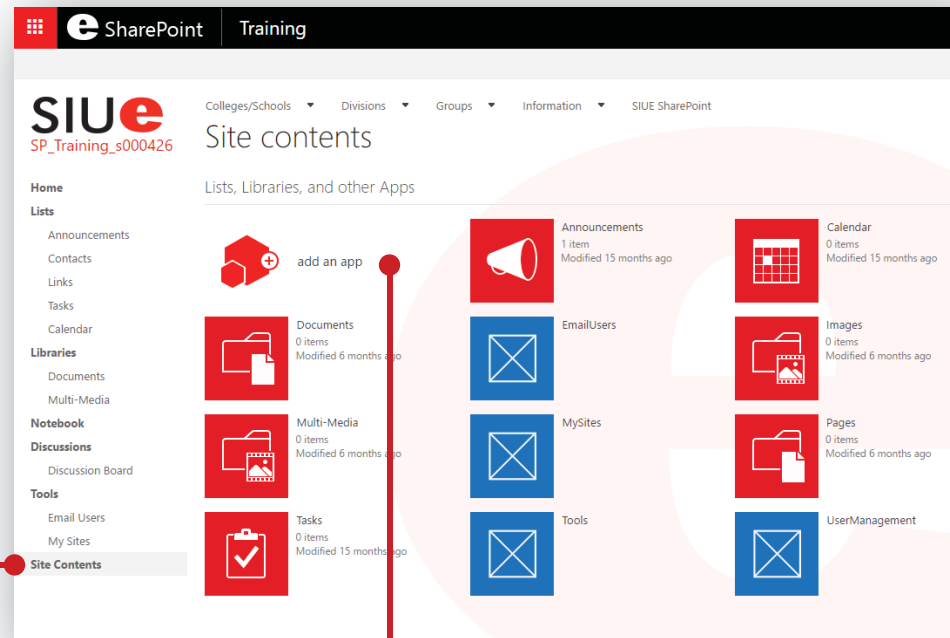
OR

My Sites

Your list of sites is shown on your SharePoint home page each time you log in.

SharePoint

Customize Your Site

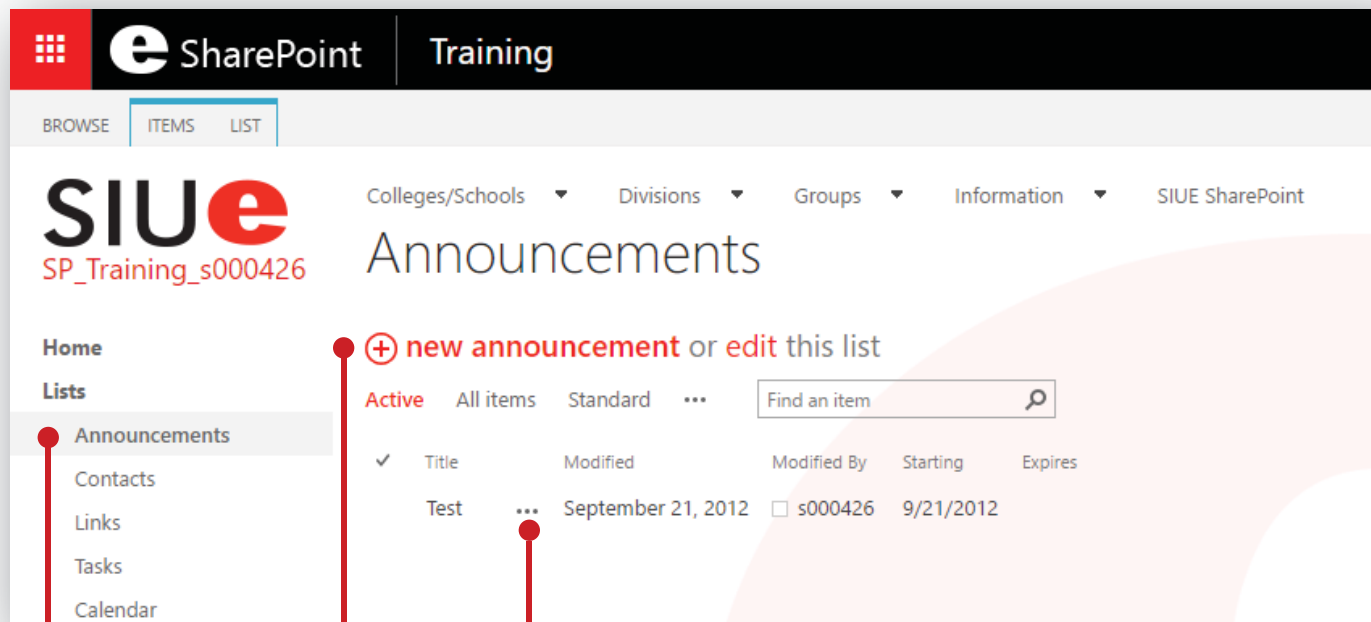


Site Contents
Click site contents.

Add an App
Click to add a new list, library, discussion board, survey, etc.

Announcements

Post important messages on the home page of the site.



Announcements
Click to manage announcements.

New Announcement
Click to add a new announcement.

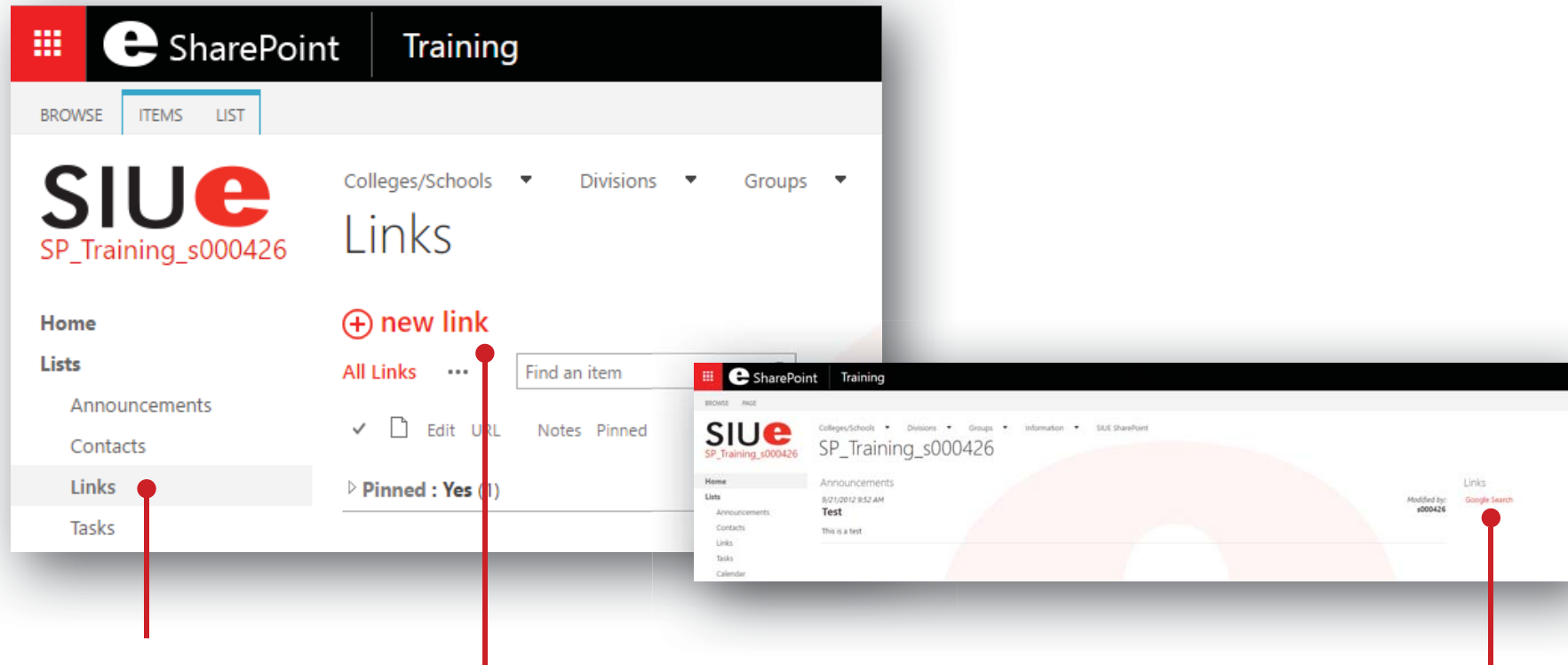
Edit Announcement
Click the **3 dots (more options)** to edit or delete an announcement.

SharePoint



Links

Add links that are relevant to your page or project to allow for quick access to those sites.



Links
Click to manage links.

New Link
Click to add a new link.

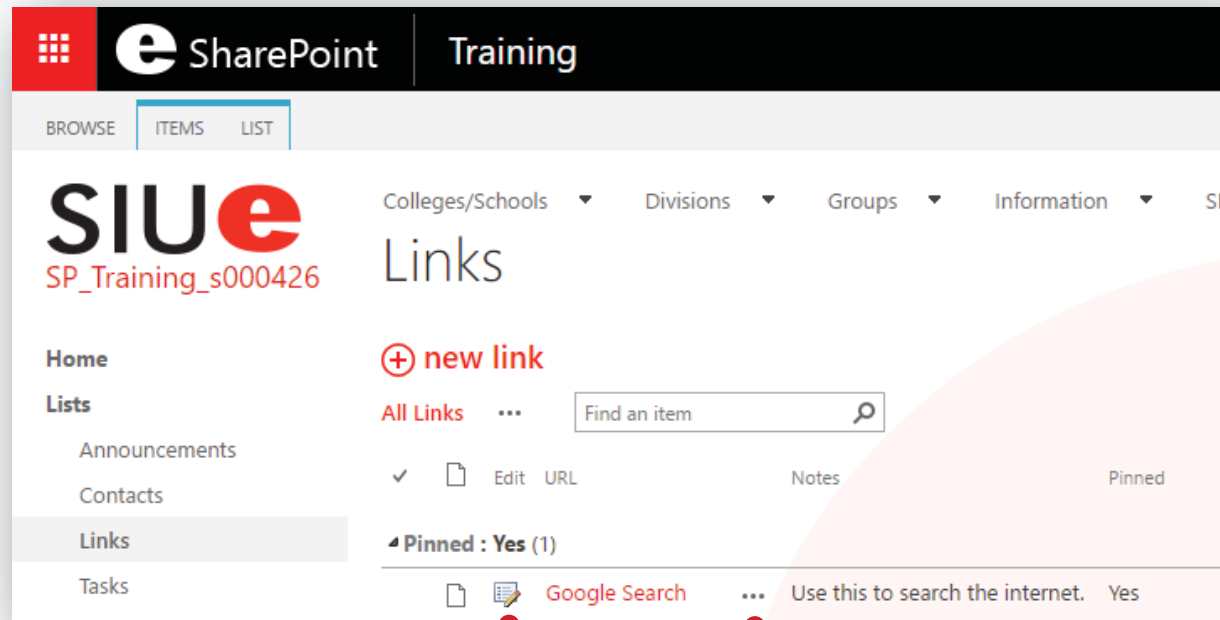
Pinned
If you click **Pinned** when adding a link, the link will show up on the site home page for easy access.

SharePoint



Links

Add links that are relevant to your page or project to allow for quick access to those sites.



OR

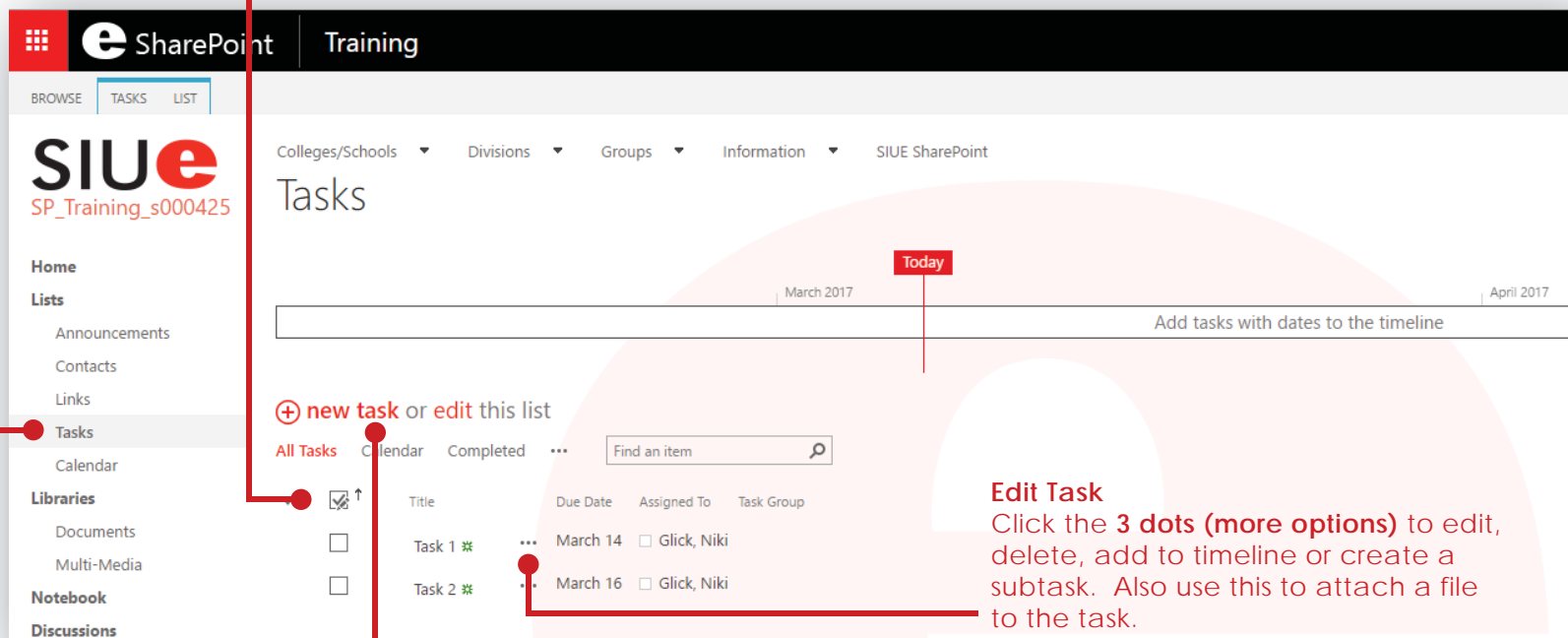
Edit a Link
Click to edit the link.

Tasks

Build a project plan with tasks. Assign tasks to individual people, set due dates, create subtasks and add predecessors.

Complete a Task

Check the **box** to mark the task complete.



Tasks

Click to access the task list.

New Task

Click to add a new task.

Tasks

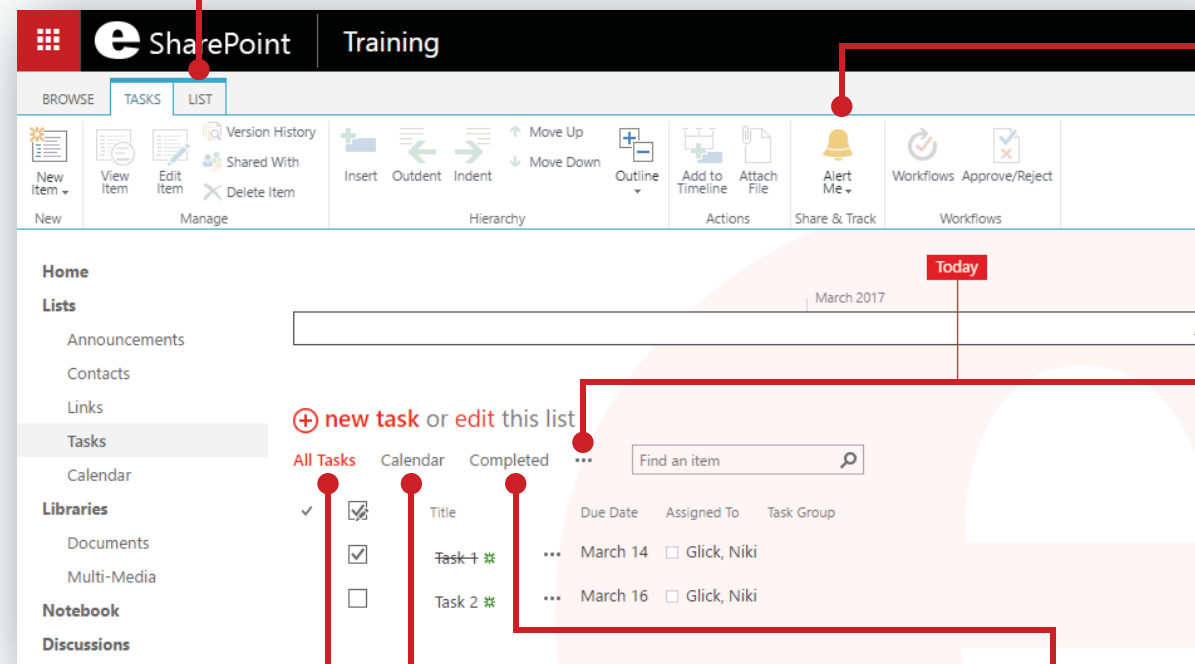
Build a project plan with tasks. Assign tasks to individual people, set due dates, create subtasks and add predecessors.

List Alerts

To receive an alert on changes to any task in the list, click **List** from the top menu bar then click **Alert Me**.

Specific Task Alerts

Select a task from the list then click the **Tasks** tab at the top. Click **Alert Me** to receive an email or text when that task is modified and meets your alert criteria.



Change Your View

Click the **3 dots (more options)** to view a Gantt Chart, late tasks or other custom view.

All Tasks

This is the default view.

Calendar

View tasks on a calendar.

Completed

View only completed tasks.

Calendars

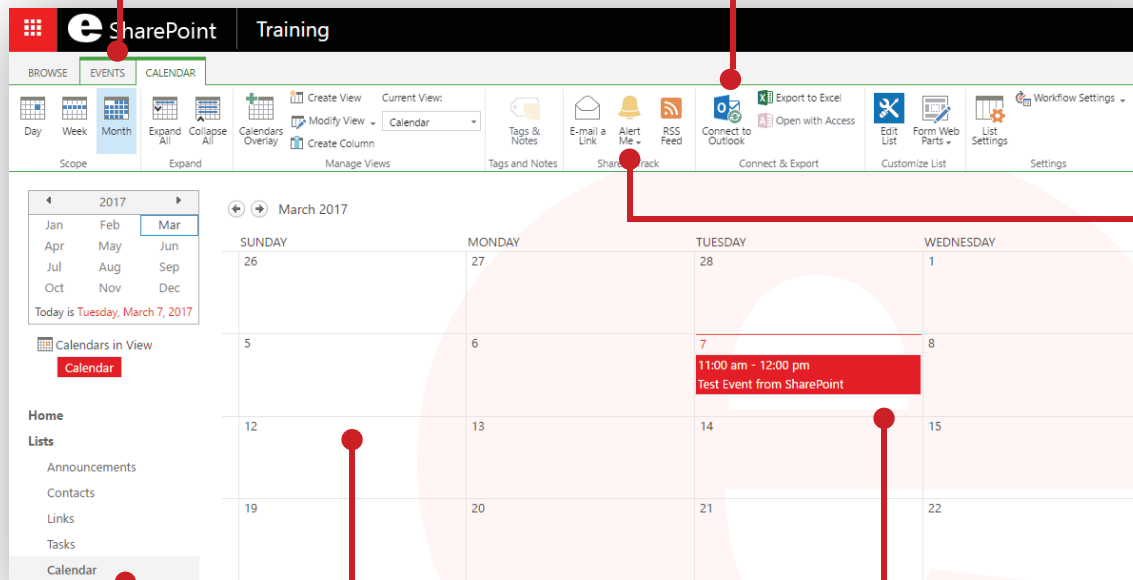
Manage site specific events on a site calendar.

Event Alerts

To receive an alert on changes to a specific event, click the **specific event** on the calendar. Next, click **Events** from the top menu bar then click **Alert Me**.

Connect to Outlook

To sync the SharePoint calendar to your Outlook calendar, click **Connect to Outlook**.



Calendar Alerts

To receive an alert on changes to the calendar, click **Calendar** from the top menu bar then click **Alert Me**.

Calendar

Click to view Calendars.

Add Event

Click a date to add an event.

Edit an Event

Click an existing event to edit.

SharePoint

Document Library: Library Settings and Syncing

The screenshot shows the SharePoint interface for a Document Library. The top navigation bar includes 'SharePoint' and 'Training'. Below it, the 'LIBRARY' tab is selected. The ribbon contains various tools: 'View', 'Quick Edit', 'Create View', 'Modify View', 'Create Column', 'Tags & Notes', 'E-mail a Link', 'Alert Me', 'RSS Feed', 'Most Popular Items', 'Sync', 'Connect to Outlook', 'Connect to Office', 'Export to Excel', 'Open with Explorer', 'Form Web Parts', 'Edit Library', 'New Quick Step', 'Library Settings', 'Shared With', and 'Workflow Settings'. The main content area shows a 'Home' section with 'New', 'Upload', 'Sync', and 'Share' buttons. Below this is a 'Lists' section with 'All Documents' and a search box. A table lists documents with columns for Name, Modified, Modified By, and Checked Out To. Two red lines with circular endpoints point to the 'Sync' button in the ribbon and the 'Library Settings' button in the ribbon.

Name	Modified	Modified By	Checked Out To
SharePoint_Excel	About an hour ago	Glick, Niki	
SharePoint_Excel_Pat	February 13, 2013	s000425	

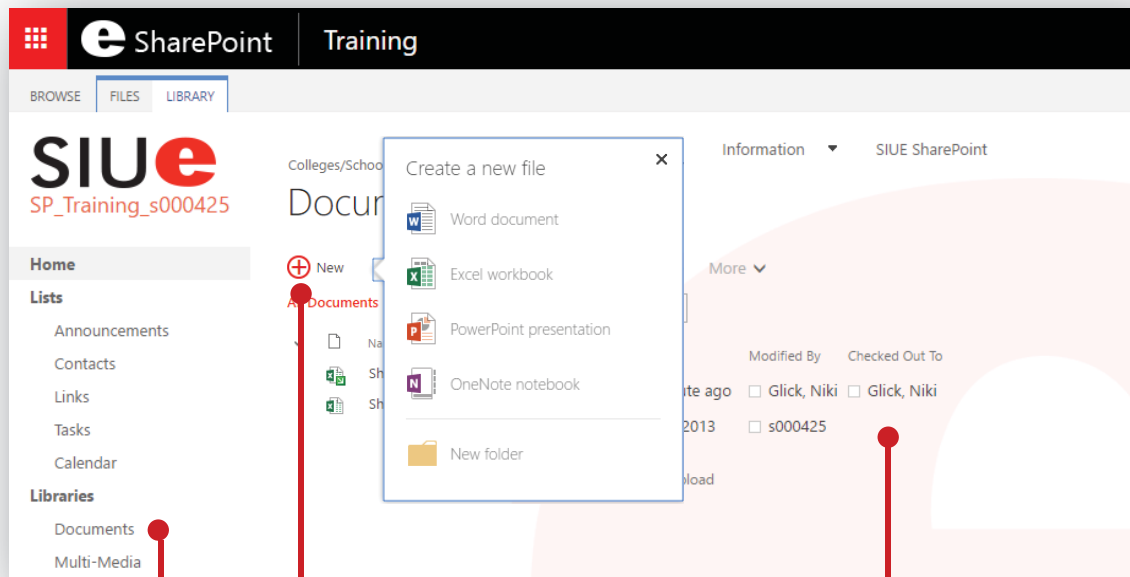
Library Settings
Change library name, permissions, versioning, etc.

Sync
Click **Sync** to create a synchronized copy of this library to your computer.

SharePoint



Document Library: Adding New Documents



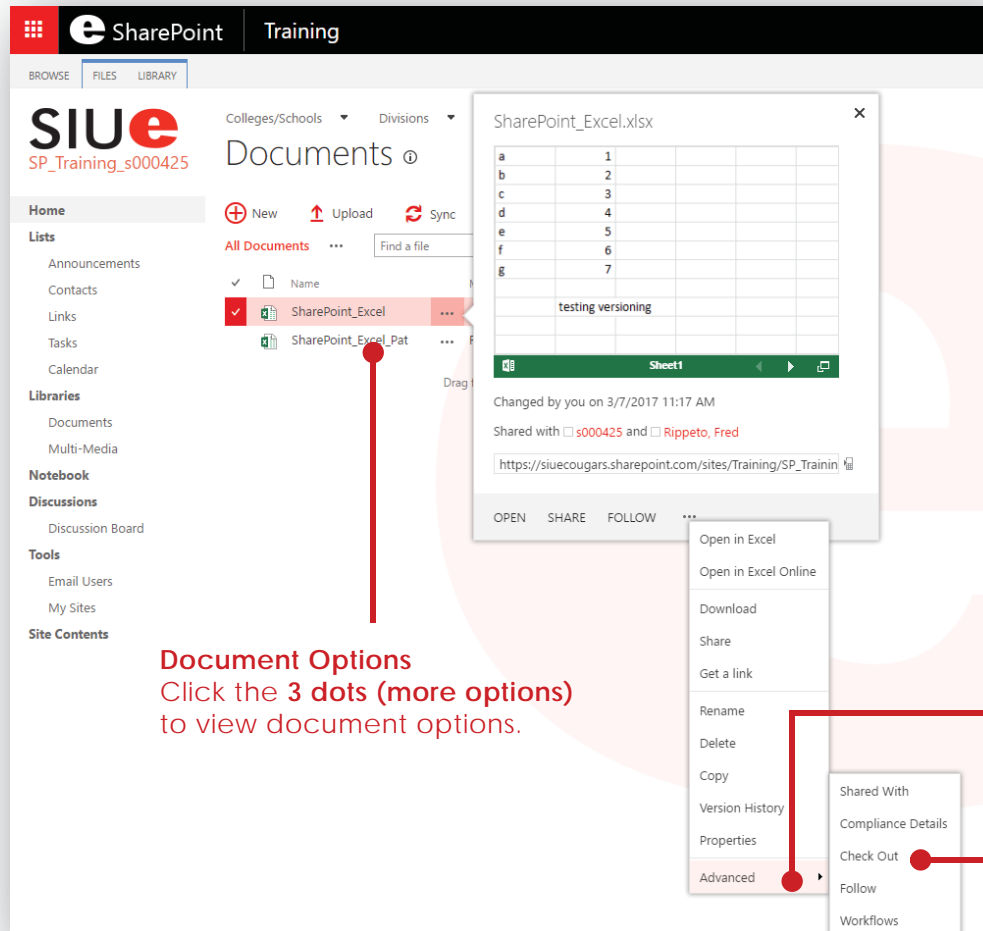
Libraries
Click the **specific document library** you wish to view.

Add Document or Folder
Click **New** to add a document or folder.

Drag to Upload
Drag a file onto the screen to upload.

SharePoint

Documents: Check Out/In



Document Options
Click the 3 dots (more options)
to view document options.

Advanced Options
Click **Advanced** to view more options.

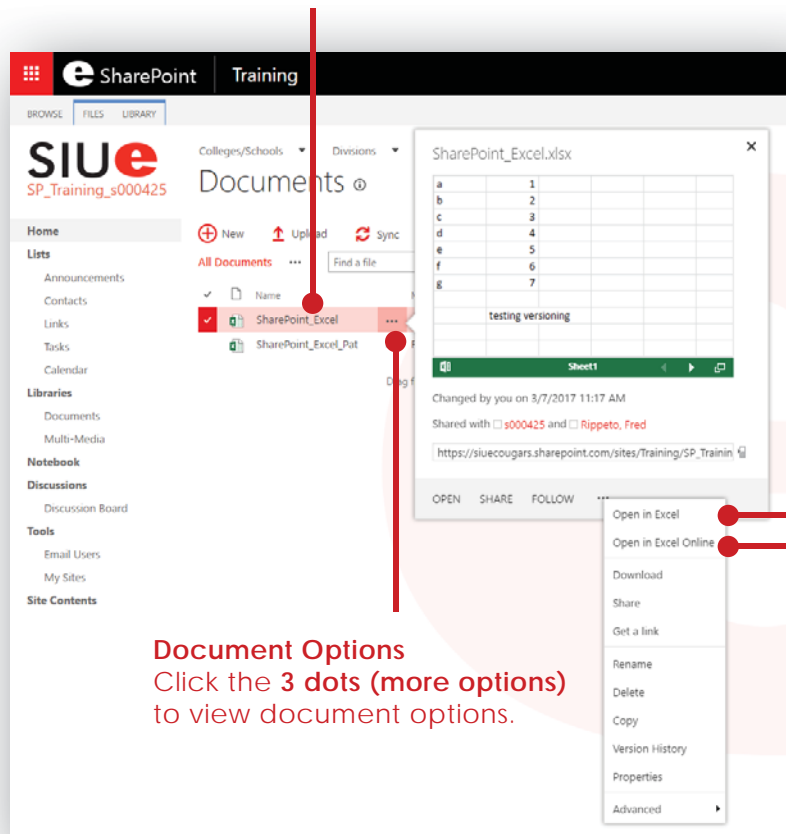
Check Out
We recommend users use the **Check Out** feature when multiple people are collaborating on the same documents. A checked out document is not editable by others until it's checked back in.

SharePoint

Documents: Editing

Open

Click the file name to open the document to edit it in the browser.



Document Options
Click the 3 dots (more options) to view document options.

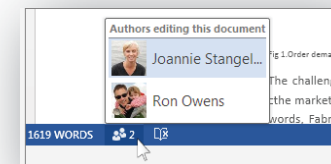
Open in Excel

Opening the document in Excel will open the desktop version of Excel. When you are done editing, use the standard File > Save to save your changes back to SharePoint. You can also save the document locally then manually upload a new version.

Open in Excel Online

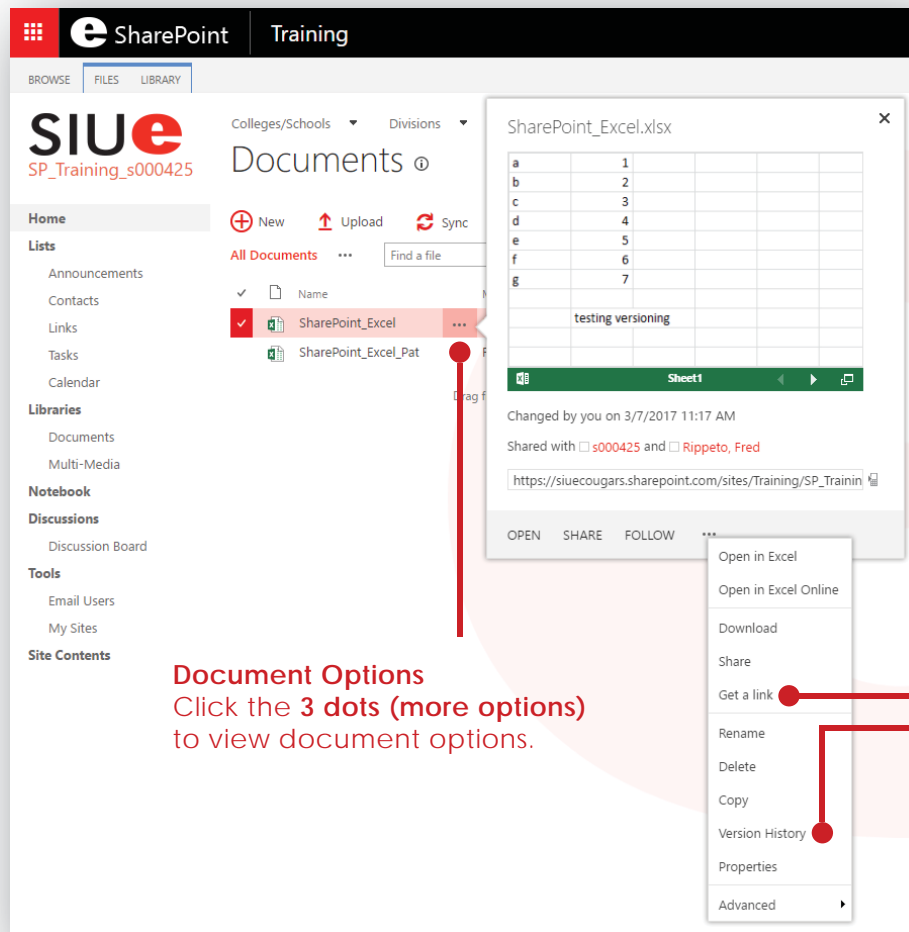
Opening the document in Excel Online will allow you to edit the document online. The document automatically saves every few seconds and when you close it, the new version will overwrite the old version of the document.

Multiple people can edit the same document at the same time as long as the file is not checked out. When you open the file, you will see who is currently editing the document at the bottom:



SharePoint

Documents: Version History and Linking



Document Options
Click the **3 dots (more options)** to view document options.

Get a Link

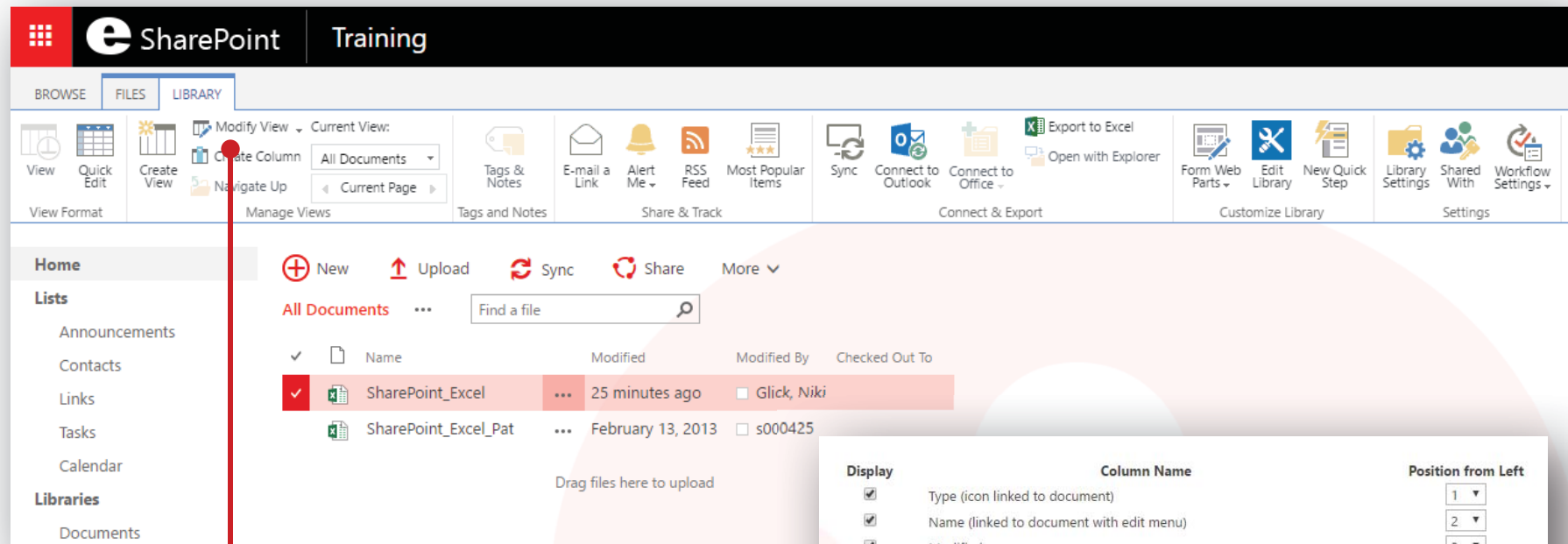
Click to get a link (URL) to the document. You can share this link with people who have access to the site. The link would bring the user directly to the document.

Version History

Click to view previous versions of the document.

SharePoint

Modify Lists and Libraries



Modify View

Click **Modify View** to add/remove columns that display on the screen for any list or library. You can also change the order of the columns on the screen as well as filter and sort the list.

Columns

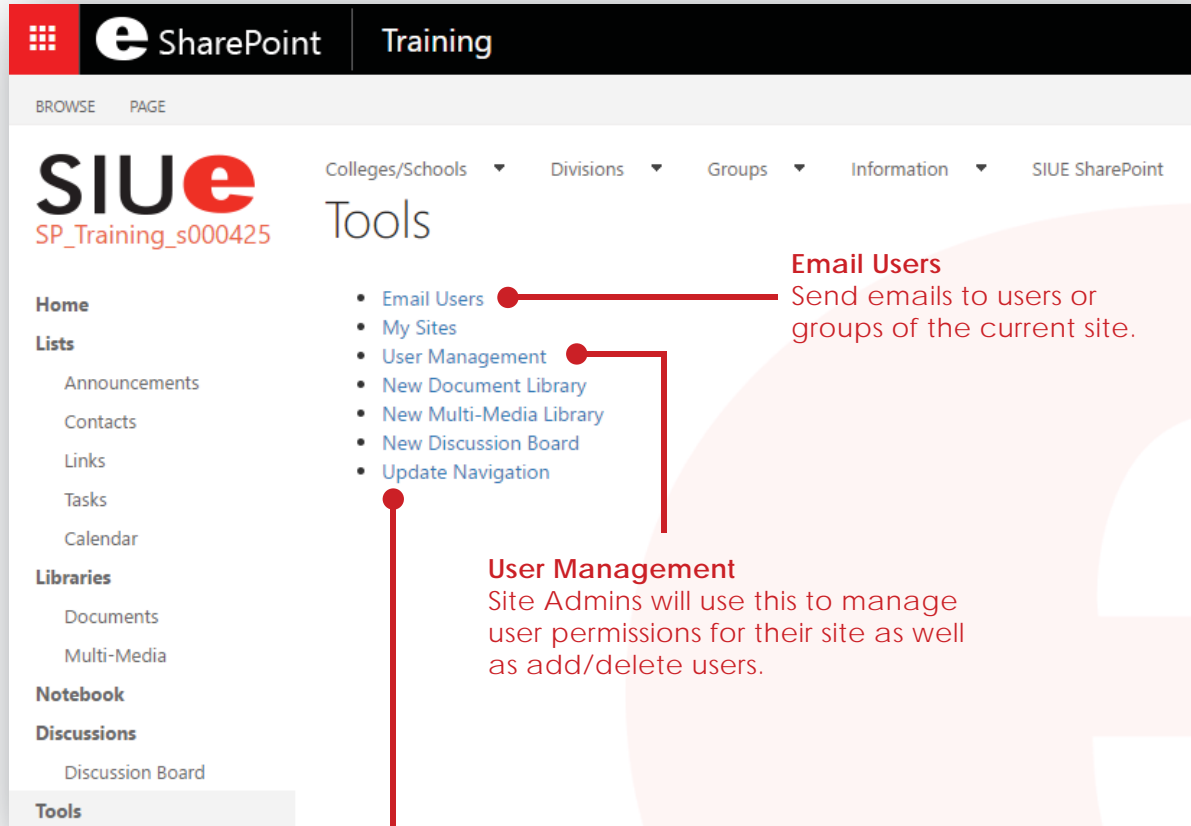
Choose which columns to show/hide

Position

Define the **order** of columns.

SharePoint

Tools



Email Users
Send emails to users or groups of the current site.

User Management
Site Admins will use this to manage user permissions for their site as well as add/delete users.

Update Navigation
Change the order of the quick navigation bar on your site, change list and library titles, restrict audience, etc.

Tools
Click **Tools** to access tool options.

Tools: User Management

User Management

Site Admins will use this to manage user permissions for their site as well as add/delete users.

Security Groups

Add users to the site with different permission levels.

Remove Users

Select a user's name and click remove.

Add Users

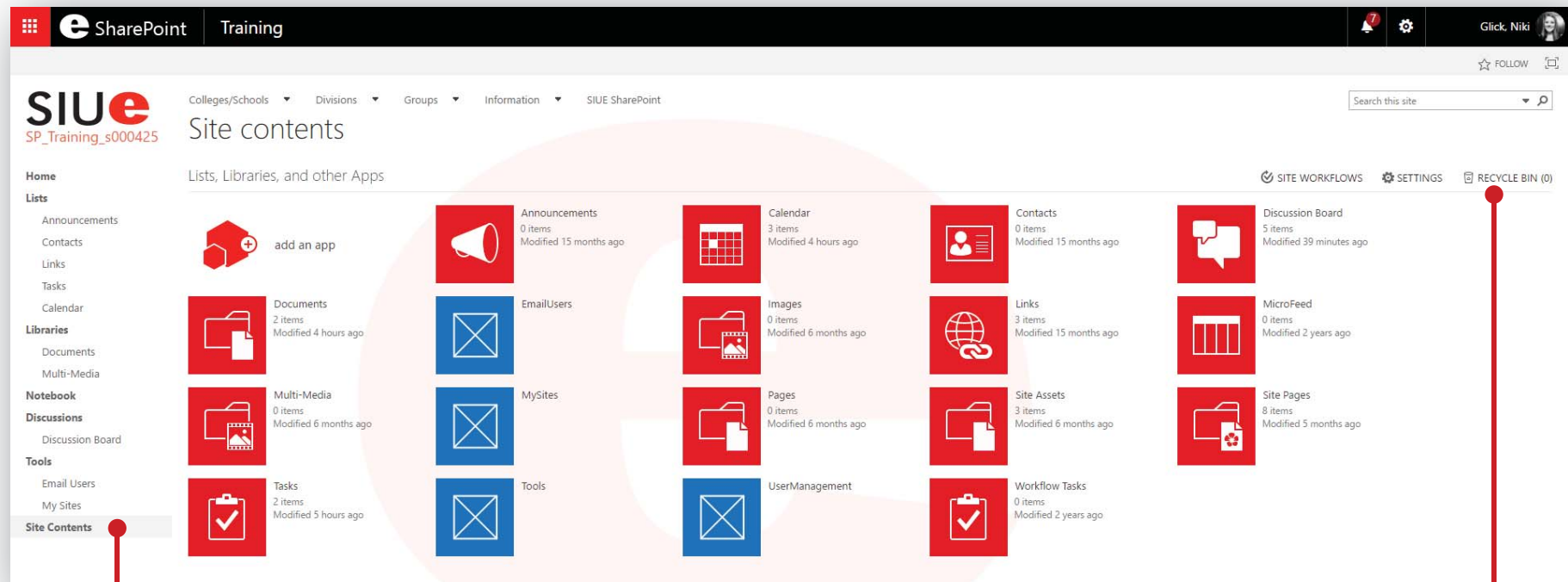
Determine the level of access the user should have (Admin, Assistant, Member, Visitor), enter their eID in the appropriate box and click add.

The screenshot shows the 'Tools' menu with 'User Management' selected. Below it is the 'User Management' page for the site 'SP_Training_s000425'. The page includes an 'Email Notification' section with a checked box for 'Send email notification to user'. There are three sections for adding and removing users based on permission levels: 'Admins', 'Assistants', and 'Members'. Each section has an 'enter eID' input field, 'Add' and 'Remove' buttons, and a list of users. The 'Admins' list shows 'Glick, Niki', 'Rippeto, Fred', and 's000425'. The 'Assistants' and 'Members' lists are currently empty.

SharePoint



Recycle Bin



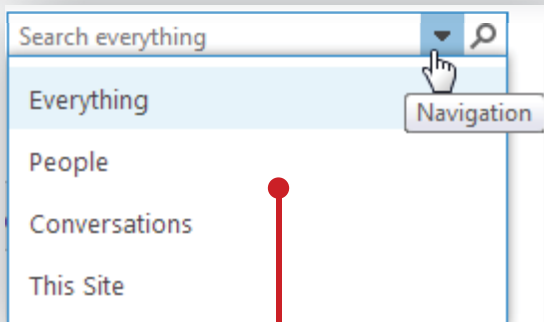
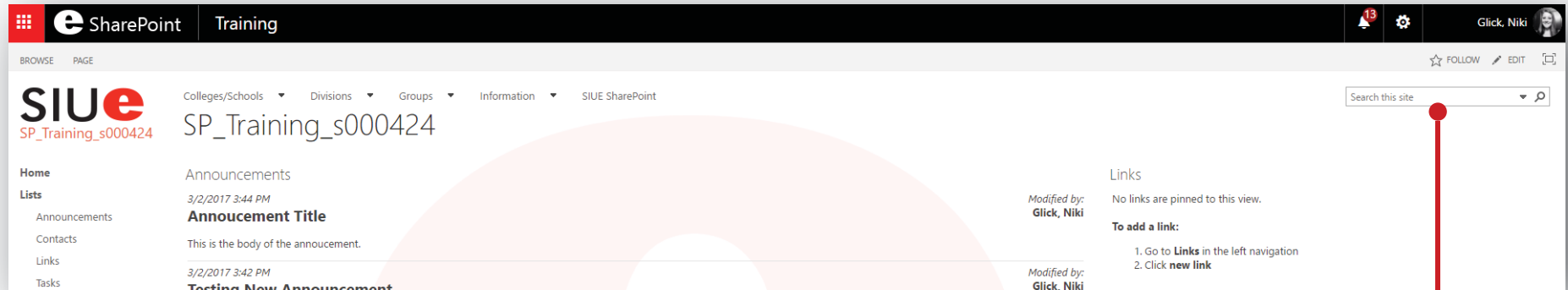
Site Contents
Click **Site Contents** to access the **Recycle Bin**.

Recycle Bin
The Recycle Bin is located in **Site Contents**. Site admins have 30 days to recover deleted items. For further assistance recovering deleted items, contact sharepointadmin@lists.siu.edu.

SharePoint



Search Sites



Search Scope
Select the scope of your search.

Search
Type a search keyword into the **Search this site** box, click the **down arrow** to elect a search scope, and then click the **search icon**.

SharePoint



Additional Resources

ITS Help Desk: 650-5500

Login to SharePoint: sharepoint.siu.edu

ITS SharePoint Resources Page: siue.edu/its/sharepoint

ITS KnowledgeBase: kb.siu.edu

Microsoft Resources: support.office.com/en-US/SharePoint

ITS SharePoint Administrator: sharepointadmin@lists.siu.edu

ITS Help Desk: help@siue.edu

ITS Trainer: itstraining@siue.edu