



# HOW-TO MANUAL

*Develop a SharePoint Site*



# SharePoint

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**THANK YOU FOR USING THIS RESOURCE.**


**IF THE READER FINDS INFORMATION OUT-OF-DATE, INCOMPLETE, OR HAS  
QUESTIONS ABOUT THE CONTENT OF THIS MANUAL- PLEASE CONTACT US.**

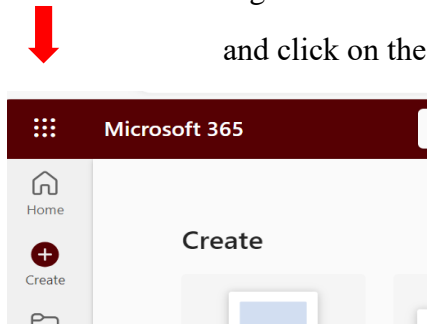
**SOAR EAGLES!**

*TLPEC@CSC.EDU*

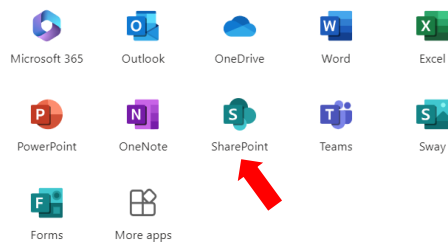
## How to Develop a SharePoint Site

These instructions will get you started on creating a SharePoint team site to provide a location where individuals and teams can work on projects and share information from anywhere on any device. For detailed information, please view-[Discover content with the SharePoint start page - Microsoft Support](#)

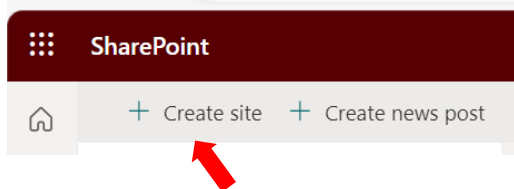
1. Sign into the Microsoft 365 account. Go to the left-hand corner of the screen and click on the “waffle”  button.



2. Click on the “SharePoint” Icon.



3. Click the “+ Create site” button in the top left corner.



*With SharePoint in Microsoft 365, creating a SharePoint [Communication](#) site is to share news, reports, status, updates, and other information in a visual format. With a communication site, typically only a small set of members contribute content that is consumed by a much larger audience.*

*A [Team site](#) is the better choice to collaborate with other members of a team, a club, or with others on a specific project. With a team site, typically all or most*

*members can contribute content to the site and the information is limited to only the members of the team or project.*


4. Look through the templates, start with a Standard Team Template.


The screenshot shows a grid of template cards under the heading "Select a template". A red arrow points to the "Standard team" card, which has the description "Manage projects, share content, and stay connected with your team." Other visible cards include "Crisis communication team", "Employee onboarding team", "Event planning", "IT help desk", "Project management", "Retail management team", and "Store collaboration". Each card features a small preview image of the template's layout. Below the grid, a red arrow points to the text "You can change the site template later under Settings."


5. Submit your choice by clicking on the template and then the blue “use template” at the bottom right-hand corner of the screen.


The screenshot shows a navigation bar with two buttons: a white "Back" button and a blue "Use template" button. A red arrow points to the "Use template" button.


5. Once the template has been selected, choose a name for the site in the site description box. Add a sight description that lets people know the purpose of the site. For example, CSC (Chadron State College) Campus Activity Board. An email address is available if needed, and a site address is automatically populated. Click the blue “next” button.

**Site name \***  
Soar Eagles   
The site name is available.


**Site description**  
Learn, engage and prosper 

**Group email address \***  
SoarEagles   
The group alias is available.

**Site address \***  
   
The site address is available.




6. Choose the privacy setting to add members. This limits access from public to private.

**Privacy settings**  
 

**Select a language**

Select the default site language for your site. You can't change this later.



7. Click the blue “Create Site” icon.


8. I recommend adding the other executive members of the group now. Type the name or email address for each member of the site.

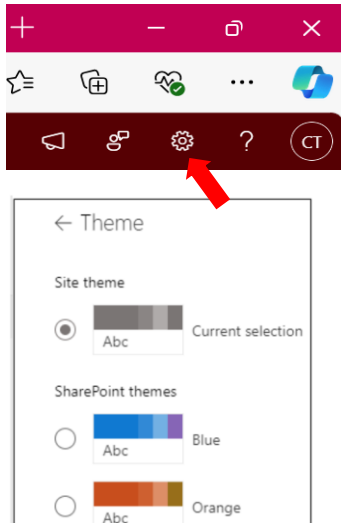
**Add members**

Click the blue “Finish” button. 

## Next steps

*Learn how to customize the blank communication site and get the most out of it.*

1. To customize colors, click on the “settings gear”  in the top right-hand corner of the page, then click “Change the look”, and “Theme”.



2. Clicking the “Change the look” and then “Header” enables:

- Change the header’s look
- Add a site logo
- Change the user view
- Change the navigation of the home page to dictate access locations.

3. Click the “Save” button to apply it to the site or to revert, click “Cancel” instead. Clicking “Republish” in the top right-hand corner saves any changes made.

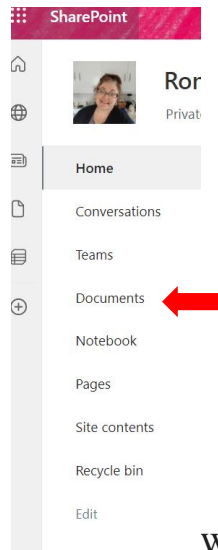
## Adding Documents

*Store the club or organization constitution, minutes, agenda’s, sign ups, photos, and any other documents within SharePoint. Among some of the choices are folders, document libraries, photo libraries, calendars, and subsites.*

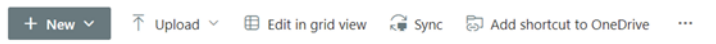
For more information about how to plan a structure to organize the content on your site, see [Plan the content for your Team Site](#).

**To add a document:**

1. From the Home Page menu, scroll down and click on “Documents”.

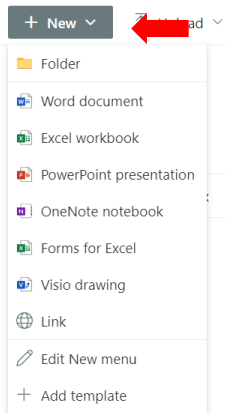


When it opens the options are to create a “ + New” document or “upload” documents.

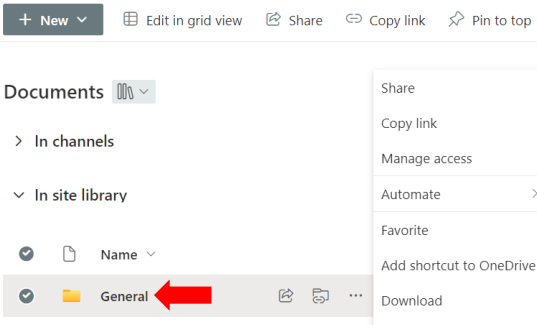


Documents

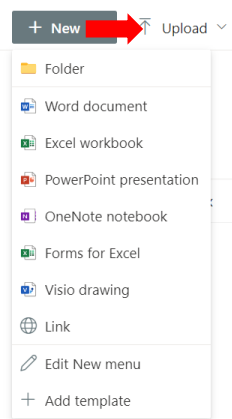
2. Select “New Document” to create files. Click on “+ New” and choose a format.



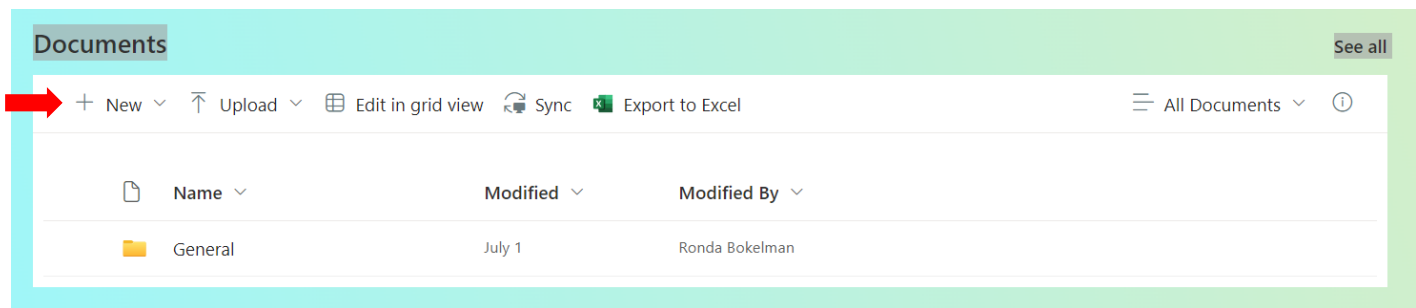
*When creating a new “Word document”, SharePoint defaults to automatically save your documents. When you exit, a “general folder” has been created.*



Another option is to select the “Upload” button. To upload documents, the files from the computer will appear



Another way to access Documents is to go to the Home page and scroll down to the bottom of your SharePoint page. A Documents section is available here.



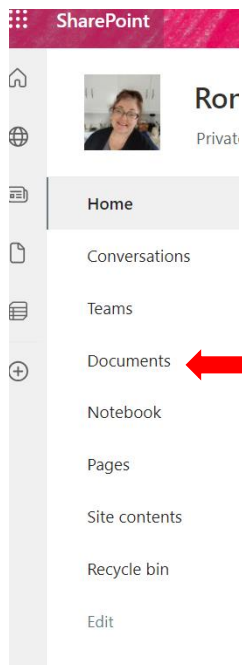
For more information, see [Upload, create, or delete files in a library.](#) and [Upload files and folders to a library - Microsoft Support.](#)



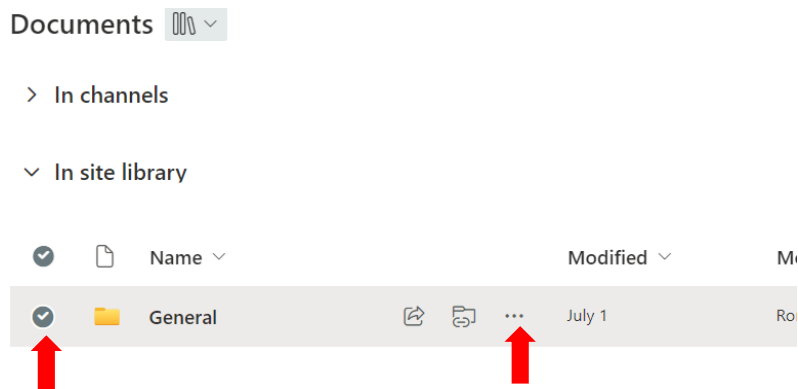
## Editing Documents

Making a personal “Library” is for [sharing a folder or document with other people](#). Click the “ellipsis” (...) to the right of a folder or document in the library to edit a document. To share a folder or a single document with people, click the “Shared with some people icon (👥)” to invite people to share the document for or type the name of someone to share the document. To make a document view only or only available to certain members of the group, change the permissions of people sharing a folder or document straight from a document library. For more detailed information go to: [Manage access to your Word documents - Microsoft Support](#)

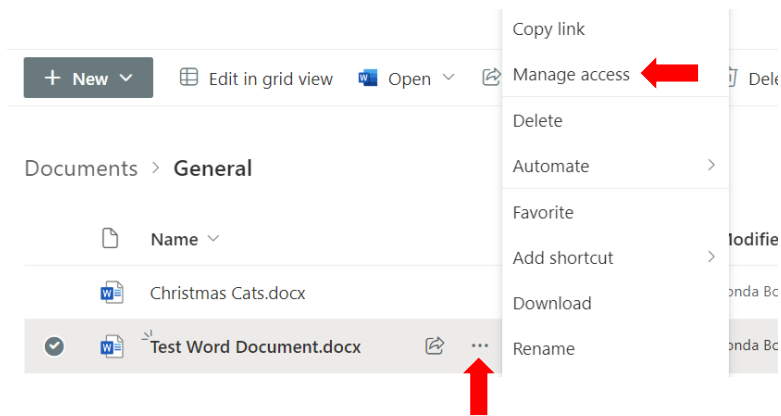
1. On the Home page, Click on Documents to enter the “library”.



Notice to the left of the folder, a circle icon appears by hovering over the folder. Click this circle to edit the folder or the documents in the folder. There is also an “ellipsis (...)” shortcut icon to the right of the folder to enter a menu to make editing changes.



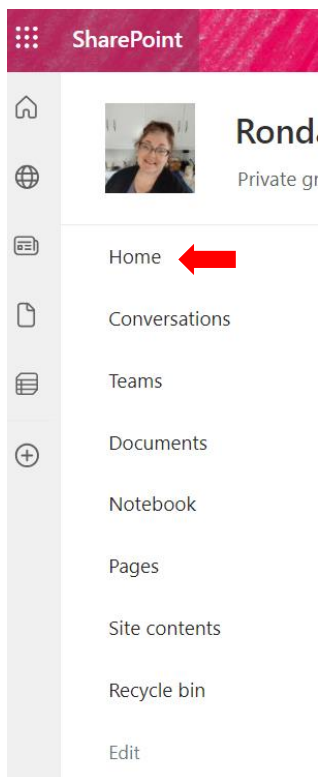
2. Click the ellipsis to open the menu, and then click “Manage access”.



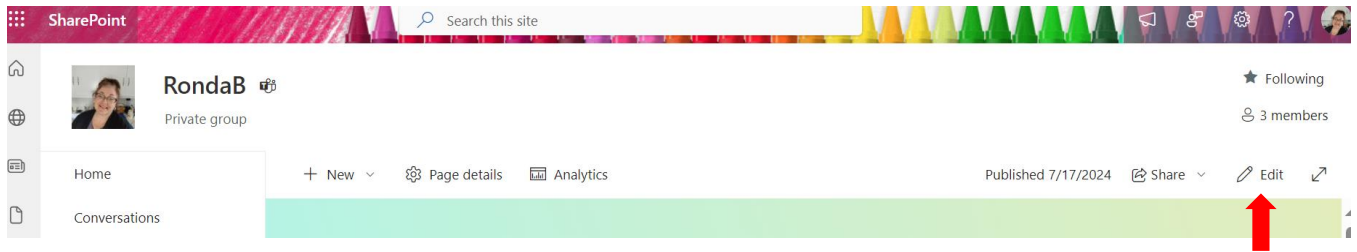
**Note:** Changes to a folder apply to all documents within the folder unless you select a document and specifically set different permissions for the people with whom the document has been shared.

## Editing the Site

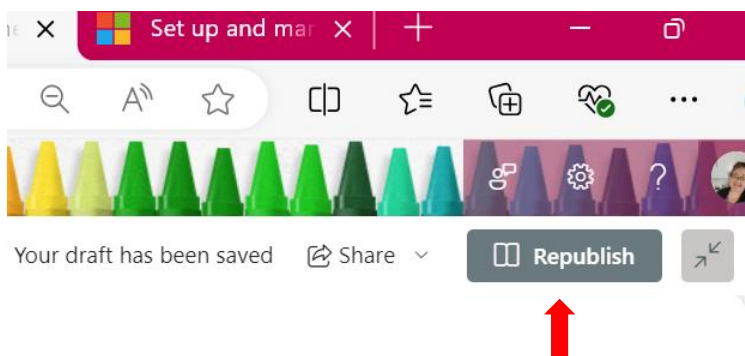
1. Go to “Home” on your menu.



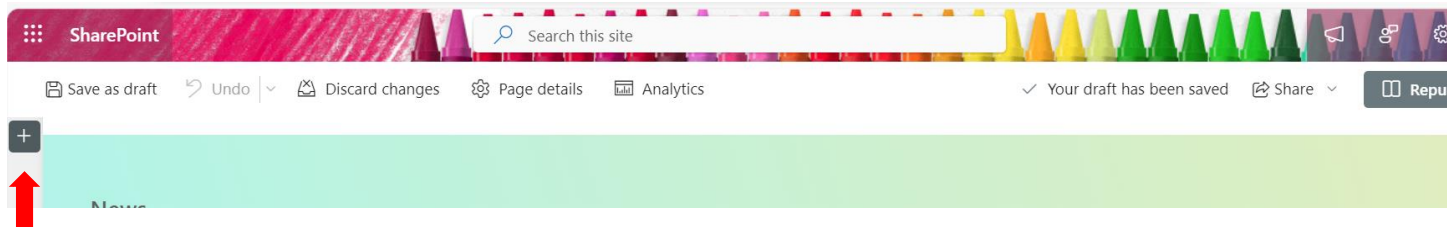
2. To customize and edit your site click the “Edit” button in the top right-hand corner.




**IMPORTANT**-After each time the site is edited, click the “Republish” button in the upper right-hand corner to save it to the site.



Clicking the + “plus” icon to the left of the page will allow changes to the format of SharePoint.



## Creating A Calendar

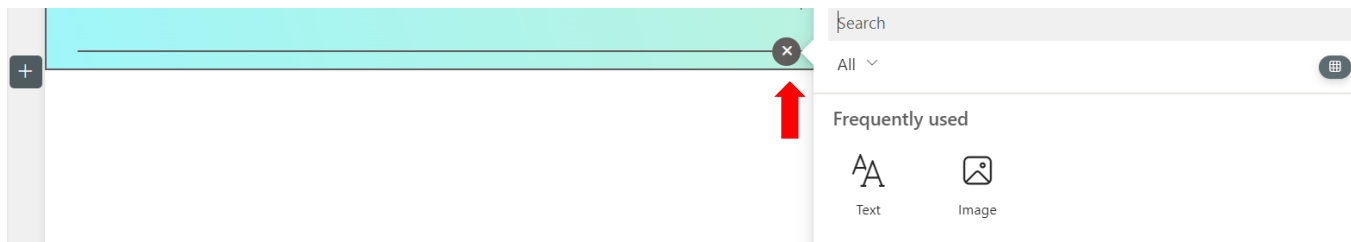
1. Click the “Home” button. Click “+ New” to start a new column for a calendar or to edit a column already created, select “Edit”  at the top right of the page.



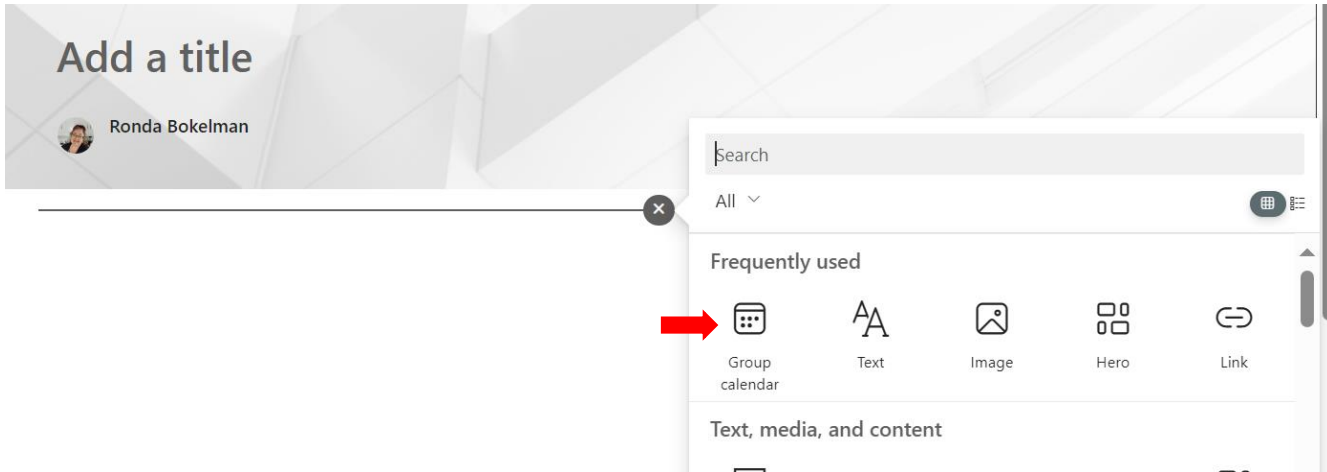
2. Hover the mouse to the middle of the new column at bottom of the column, this plus sign will appear



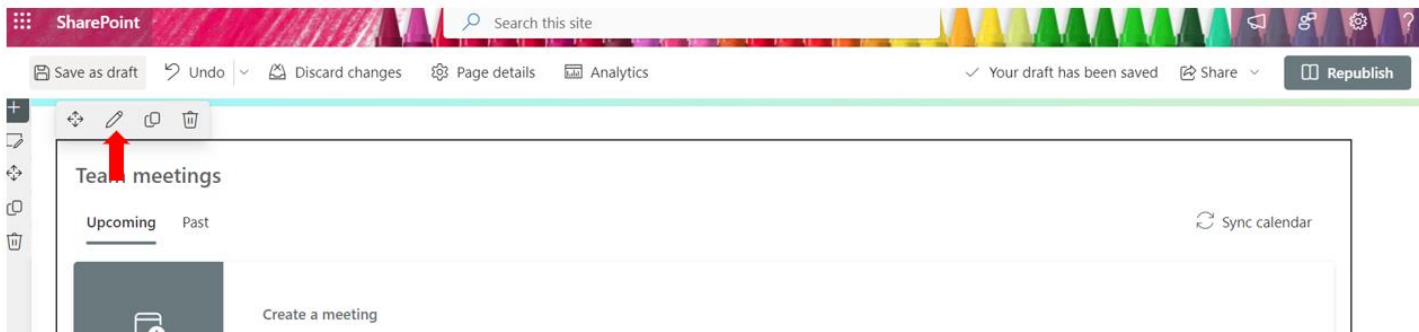
3. Click on it and another menu will drop down. Scroll down to see all the options. Select the “Group calendar” pane.



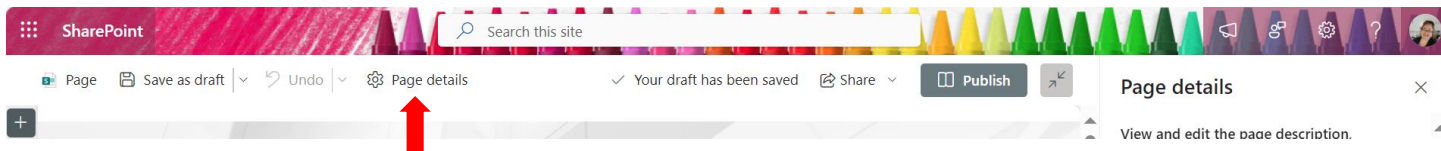
4. In the Group calendar property pane, select “Group calendar” from the dropdown menu.



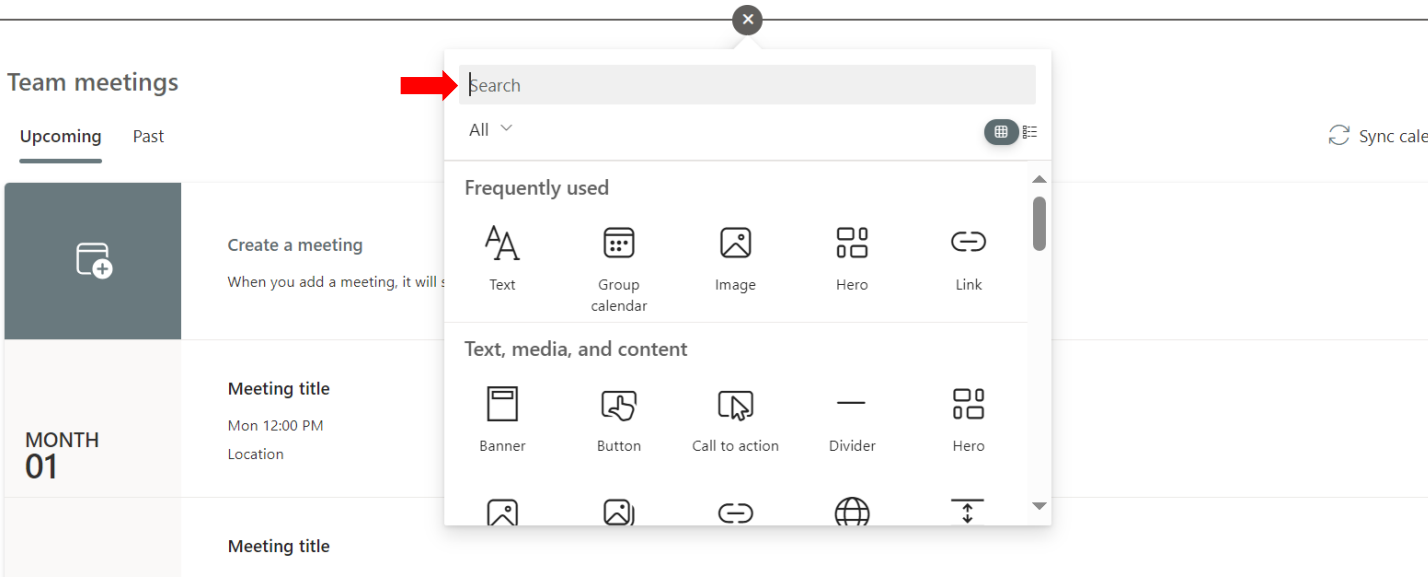
Select the Edit button  on the left side of the calendar to customize.



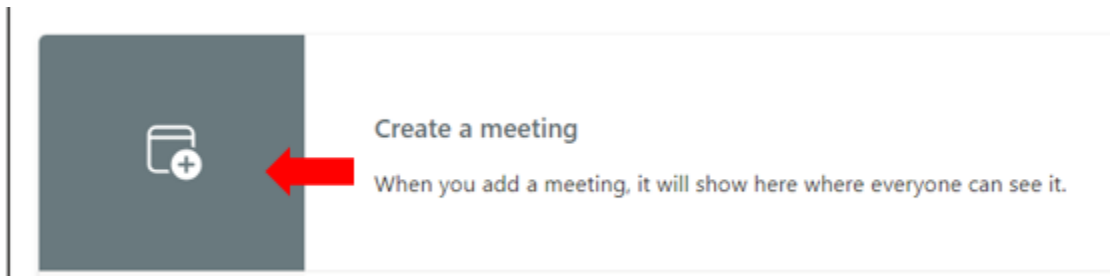
Select "Page Details" to make changes or delete it.



Use "Search" to look for specific groups to add.

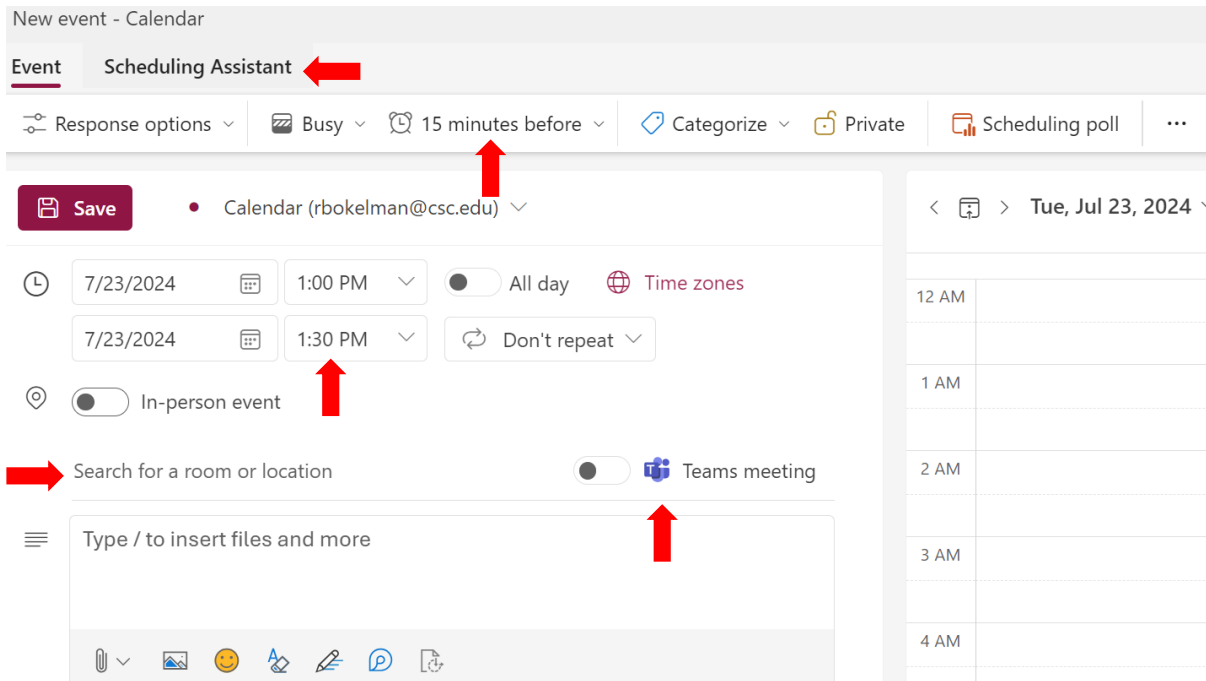


To create a meeting Click the “Create” button 



Some options under “Scheduling Assistant” are:

- Setting the time
- Changing the meeting location
- Sending email notifications to members
- Reminders for start times and dates
- Linking to teams if it is an online meeting.

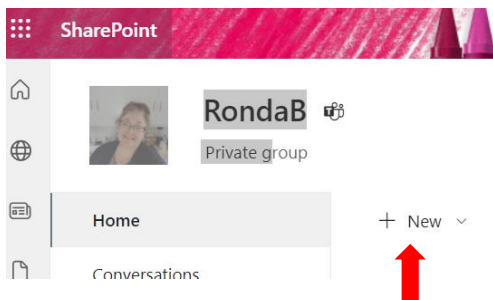


For more information: [Create a group calendar](#) and [Calendar Events](#).

## Adding a Photo Library

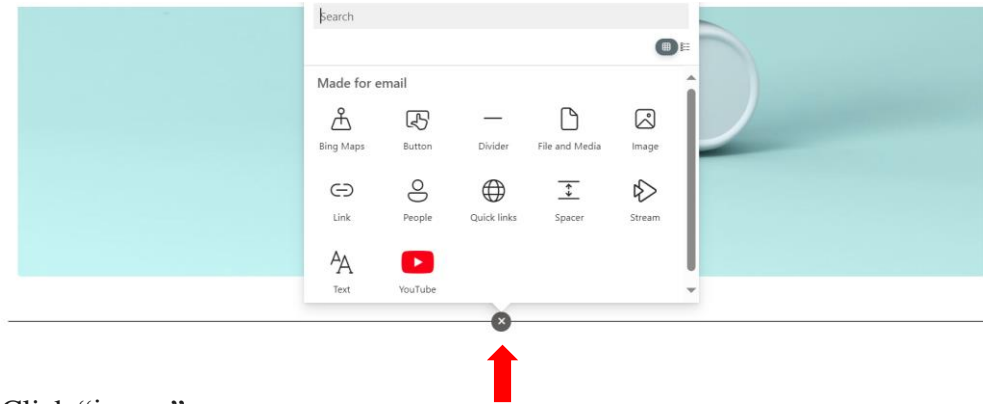
*For photos of club members and activities, SharePoint can store and share them. Add them to a folder in documents or display them on the home screen. Add images from a local computer, SharePoint media libraries, or links from other locations on the site or the web.*

1. To display photos on the home screen, Click the small “plus sign” to add a new web column.

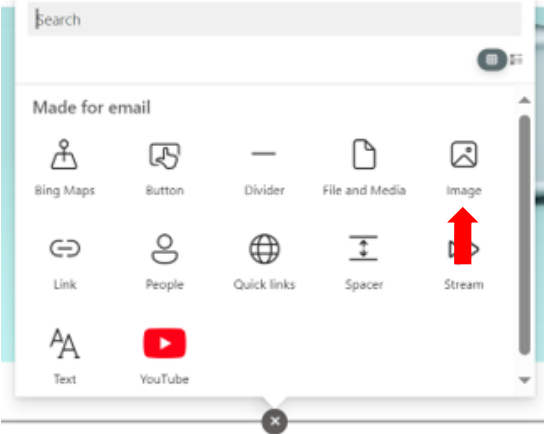


2. Hover to the middle of the page and click on the circle with the “X”.

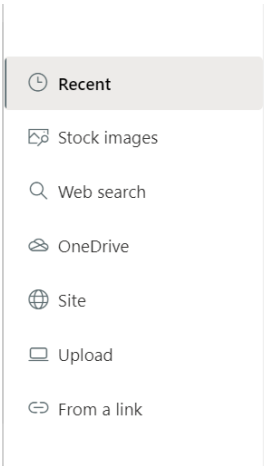




3. Click “image”.



This will open a new dropdown menu:



4. Choose an option to find the photos or images then click “Insert” at the bottom right of the page.




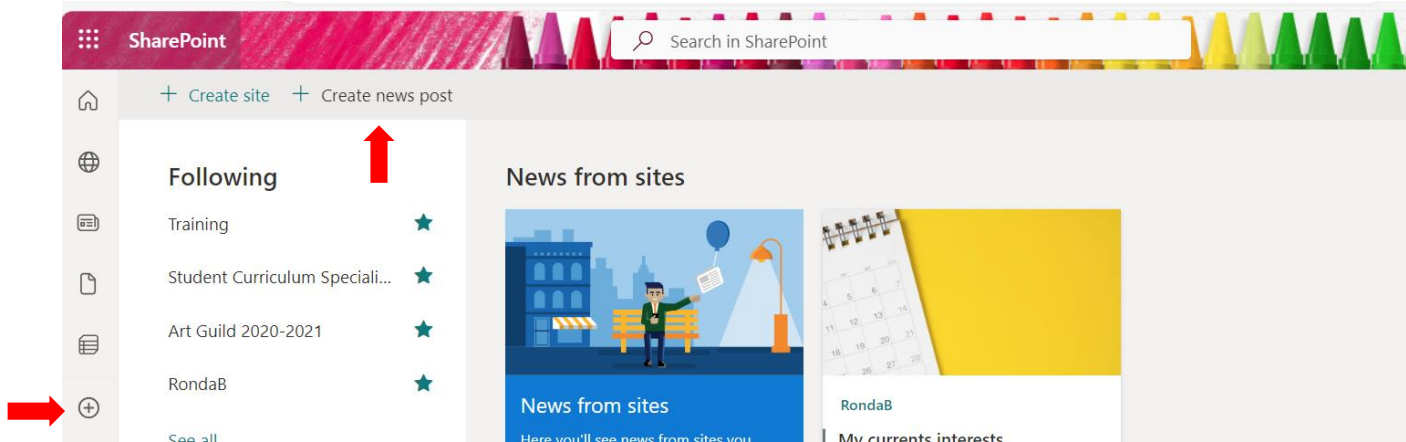


For more information: [Using Image Gallery](#)

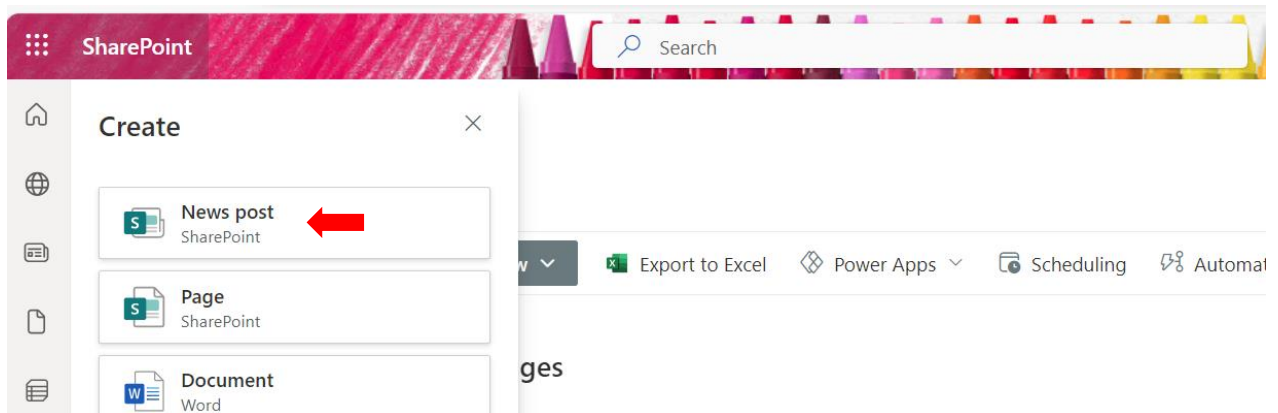
## Adding a News Post

*News posts can be used instead of emailing club members. This will also be seen on the home page in SharePoint. While on the home page (not the editing page), add a news post.*

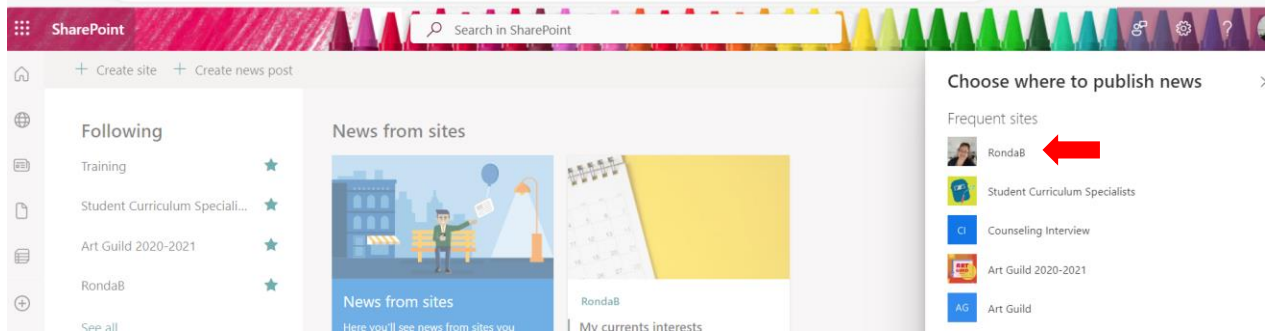
5. On the SharePoint site, click on the “+ Create news post” button. Another method is to go to the  on the left side, and on the drop-down menu, click “News post”.



6. From here pick the template “News post”.



7. Choose where to publish the news post. This list will populate if you are following other members.



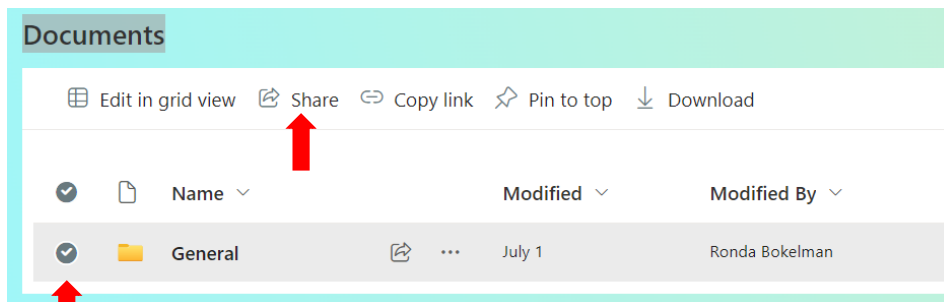
*Add the information in the post. Type in the name of the SharePoint group, this will send the news post in an email format to all members of the group.*




8. Click “Post” and “Send”. For more information see: [Create A News Post](#) and [News post links](#)

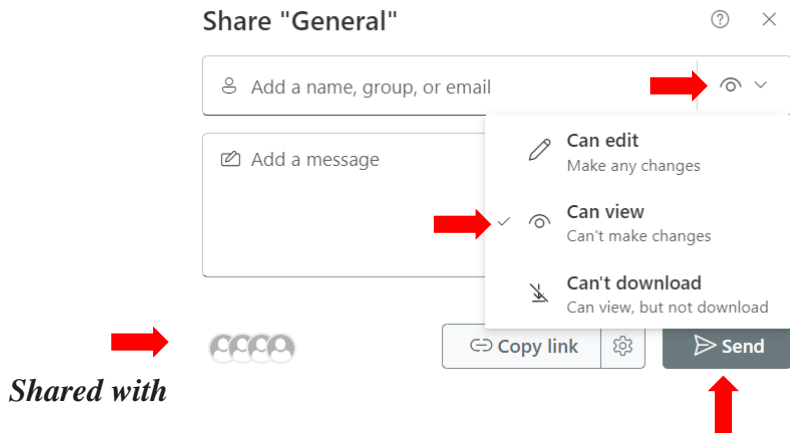
## Share by Using Copy Link

*Choose this option to share items publicly with people. For example, these links can be posted to Facebook, Twitter, or LinkedIn, or shared in an email or message. Anyone who gets the link can view or edit the item, depending on the permissions set.*

1. On the SharePoint site, go to the documents/library of the files to share.
2. Pick the file or folder to share by selecting its circle icon.



3. Select the circle on the left side of the item.
4. Select “ **Share**” at the top of column.
5. Control the access for the other person by clicking the eye icon  . There will be a small “checkmark  ” to show permissions.



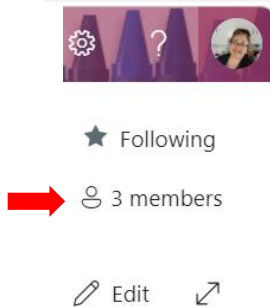
6. When finished editing, click the “Send” button.

*Sharing multiple items at the same time is not available. Add the things to share to a folder and then share the folder. If the selected file or folder is shared with someone already, there is a **Shared with** list at the bottom. If the selected file or folder is not currently shared with someone, there will not be a **Shared with** list.*

For more information: [Share SharePoint files or folders](#)

## Adding Members to a Group

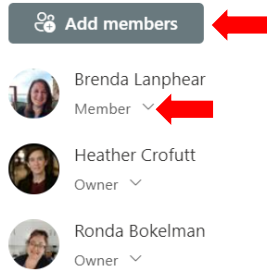
1. In the Home menu, Click on the “Members Icon” in the top right corner of the screen.



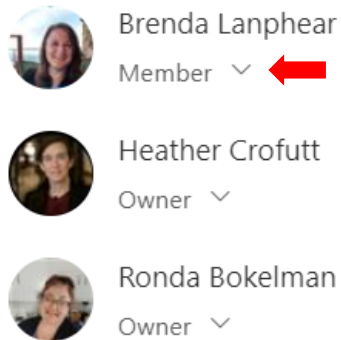
*The members are shown. Notice the titles under names, Member and Owner. Members may be added here.*

## Group membership

3 members



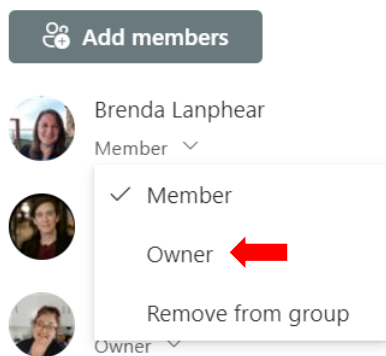
2. To change access, click on the “down arrow” next to the title and a drop-down menu appears.



3. Changing the members to owners will enable access to hidden documents and privileges to edit and update the website.

## Group membership

3 members

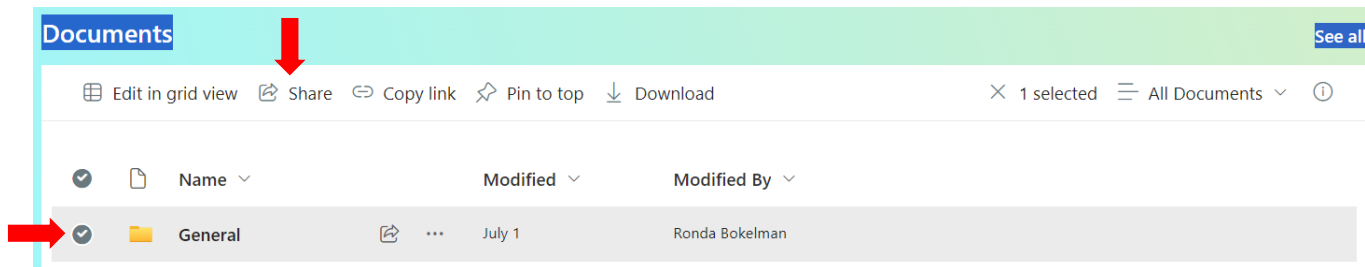


For more information see: [Granting & Customizing Permissions](#)

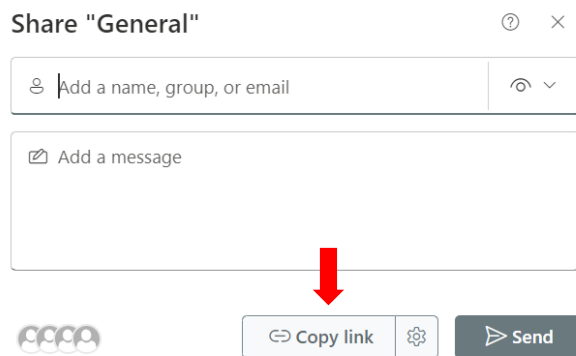
## Sharing Links in SharePoint

*Creating a shareable link makes it simple to share a document in an email or document, or Teams (instant message).*

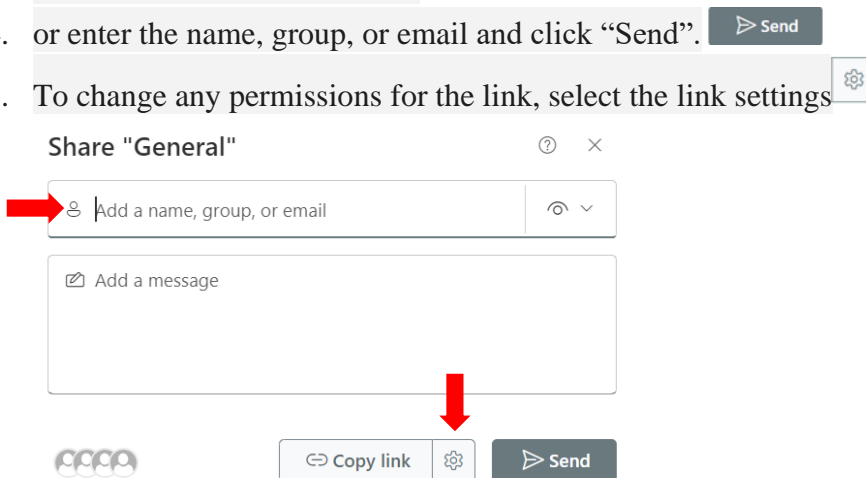
1. In documents library, select the document to share by check marking the circle, then Select “Share”.



2. Select “Copy Link”.



3. Paste the link to the document
4. or enter the name, group, or email and click “Send”.
5. To change any permissions for the link, select the link settings



For more information visit: [Share OneDrive files and folders - Microsoft Support](#)

This is a basic overview to getting started with SharePoint, there is much more to learn at: [SharePoint help & learning](#) and [Getting started](#).