SEPTEMBER 2024



HOW-TO MANUAL

Develop a SharePoint Site

SharePoint

Teaching Learning Professional Education Center

HOW-TO DEVELOP A SHAREPOINT SITE

ABLE OF CONTENTS

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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IF THE READER FINDS INFORMATION OUT-OF-DATE, INCOMPLETE, OR HAS QUESTIONS ABOUT THE CONTENT OF THIS MANUAL- PLEASE <u>CONTACT US</u>. 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-<u>Discover content with the SharePoint start page - Microsoft Support</u>

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

	Microsoft 365
Home	
Ð	Create
Create	
P	

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 <u>Communication</u> 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.

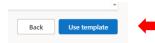
A <u>Team site</u> is the better choice to collaborate with other members of a team, a club, or with others on a specific project. With a team site, typically all or most

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.

Standard team Manage projects, share content, and stay connected with your team.	Crisis communication team Centralize crisis communication, resources, and best practices.	Employee onboarding team Guide new employees through your team's onboarding process.
<page-header></page-header>		<page-header></page-header>
IT help desk Manage technical requests, track devices, and share training materials.	Project management Collaborate with your team to share project details and resources.	Retail management team Unite retail store managers, emphasize store news, and share management resources.

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



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		
Group email address *		
SoarEagles		
The group alias is available.		
Site address *		
https://eaglescsc.sharepoint.com/sites/	SoarEagles	
The site address is available.	· · · · · · · · · · · · · · · · · · ·	
	Back Next	-

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

Privacy settings		
Private - only members can access this site	~	
Select a language		
English	~	
Select the default site language for your site. You can'	't change this later.	
	Back Create site	-

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				
Start typing a name				

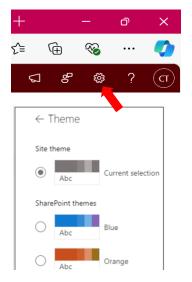
Click the blue "Finish" button.

Finish

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 <u>Plan</u> the content for your Team Site.

To add a document:

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

	SharePoint	4
ଜ		Ror
		Privat
	Home	
۵	Conversation	15
	Teams	
	Documents	-
+	Notebook	
	Pages	
	Site contents	
		5
	Recycle bin	
	Edit	
do	cuments.	
uU	cumento	•

+ New \sim \uparrow Upload \sim \boxplus Edit in grid view $\stackrel{\frown}{\leftarrow}$ Sync $\stackrel{\frown}{\otimes}$ Add shortcut to OneDrive \cdots

Documents 🕅 🗸

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

+	New Y
	Folder
2 -	Word document
	Excel workbook
	PowerPoint presentation
	OneNote notebook
	Forms for Excel
ø	Visio drawing
\bigoplus	Link
Ø	Edit New menu
+	Add template

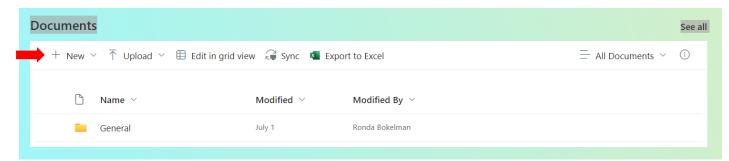
When creating a new "Word document", SharePoint defaults to automatically save your documents. When you exit, a "general folder" has been created.

+ New ~	🗄 Edit in grid view	🖻 Shar	. 🕀	Copy link 🔗 Pin to top
Documents				Share
> In channels	5			Copy link Manage access
✓ In site libra	iry			Automate >
Ø 🗅 и	ame $$			Favorite Add shortcut to OneDrive
🔮 📒 G	eneral	r t	<u>,</u>	Download

Another option is to select the "Upload" button. To upload documents, the files from the computer will app

+ New
📁 Folder
Word document
Excel workbook
PowerPoint presentation
OneNote notebook
Forms for Excel
😰 Visio drawing
🕀 Link
🖉 Edit New menu
+ Add template

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.

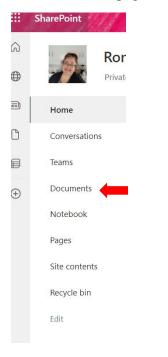


For more information, see <u>Upload, create, or delete files in a library</u>. and <u>Upload files and folders</u> to a library - Microsoft Support.

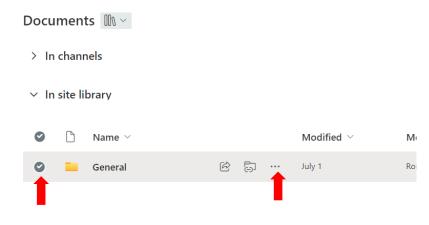
Editing Documents

Making a personal "Library" is for <u>sharing a folder or document with other people</u>. 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: <u>Manage access to your Word documents - Microsoft Support</u>

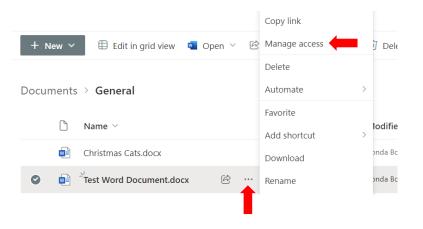
1. On the Home page, Click on Documents to enter the "library".



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.



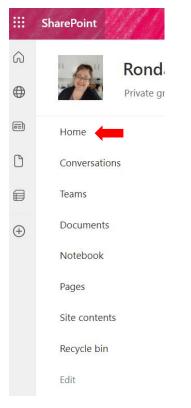
2. Click the ellipsis to open the menu, and then click "Manage access".



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.

	SharePoint			✓ Search this	site				@ ?	
ଜ	Ro	ndaB	u fji						🖈 Follo	wing
	Priva	ate group							₿ 3 mer	mbers
	Home		+ New ~	ô Page details	Analytics		Published 7/17/2024	🖻 Share 🗸	0 Edit	Z
٥	Conversations								1	í

<u>IMPORTANT</u>-After each time the site is edited, click the "Republish" button in the upper righthand 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.

	SharePoint		114AAAAA	₽ Search th	is site			8 \$
	Save as draft	り Undo 🗸	🖄 Discard changes	ô Page details	🖬 Analytics	\checkmark Your draft has been saved	🖻 Share 🗸	🔲 Repu
+								
1	Maure							

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.

	iharePoint	
6	RondaB 🕫	
	Private group	
	Home + New ×	
ß	Conversations	
	arePoint 🔎 Search this site	?
â	RondaB 🕫	Follow
		3 mem
	Home + New × 🕸 Page details 🖾 Analytics Published 7/23/2024 🖄 Share × 🖉 E	Edit

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.

Add a title						/
Ronda Bokelman	Şearch					
	All ~					800
	Frequently	used				
		Ą			\ominus	
	Group calendar	Text	Image	Hero	Link	
	Text, media	, and conte	nt			
	_					

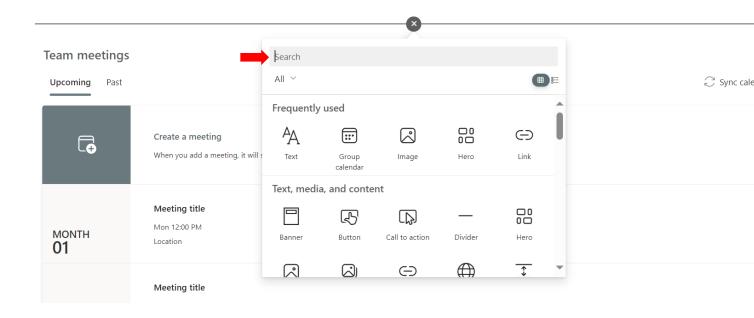
Select the Edit button \square on the left side of the calendar to customize.

🖹 Save as draft 🦻 Undo 🗸 🖄 Discard changes 🔯 Page details 🖾 Analytics	✓ Your draft has been saved
Tean meetings Upcoming Past	\sub Sync calendar
Create a meeting	

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

iii s	arePoint		⁹ Search this site				2
D P	age 📙 Save as draft 🗸	♡ Undo │ ∽ ፡ ᅇ Page details	\checkmark Your draft has be	een saved 🖄 Share 🗸	D Publish	Page details	×
+					1	View and edit the page description.	4

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



To create a meeting Click the "Create" button

Create a meeting When you add a meeting, it will show here where everyone can see it.
--

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.

New event - Calendar	
Event Scheduling Assistant	
🚓 Response options 🗸 🔤 Busy 🗸 🔅 15 minutes before 🗸 🔿 Categorize 🗸 🔂 Private	Scheduling poll
Save • Calendar (rbokelman@csc.edu) >>	< 🗊 > Tue, Jul 23, 2024 \
C 7/23/2024	12 AM
7/23/2024	
In-person event	1 AM
Search for a room or location	2 AM
Type / to insert files and more	3 AM
	4 AM

For more information: Create a group calendar and Calendar Events.

Adding a Photo Library

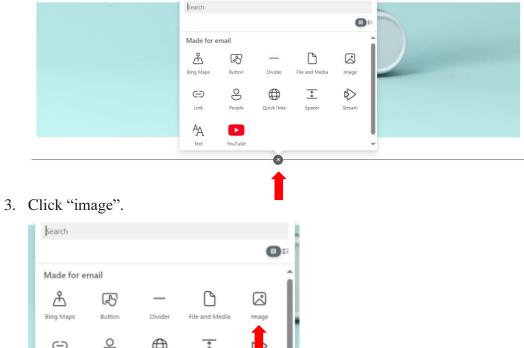
For photos of club members and activities, SharePoint can store and share them. Add them to a folder in documents or display them on the home screen. Add images from a local computer, SharePoint media libraries, or links from other locations on the site or the web.

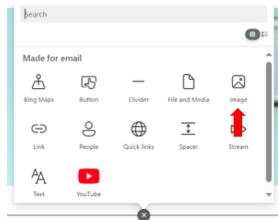
1. To display photos on the home screen, Click the small "plus sign" to add a new web column.



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

×





This will open a new dropdown menu:

<u>(</u>)	Recent
ة ح	Stock images
Q	Web search
Ø	OneDrive
\oplus	Site
	Upload
Ð	From a link

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".

		SharePoint		Search in SharePo	int	
	â	+ Create site + Create new	vs post			
	⊕	Following		News from sites		
		Training	*		ATTA:	
	٥	Student Curriculum Speciali	*			
	€	Art Guild 2020-2021	*	····· 🖶 📫 🔶 🖡	11 12 13 14 14 19 20 21	
•	\oplus	RondaB	*	News from sites	RondaB	
_		See all		Here you'll see news from sites you	My currents interests	

6. From here pick the template "News post".

	SharePoint	MAMAN	✓ Search			
G	Create	×				
	News post					
	SharePoint	N ~	🔹 Export to Excel 🛛 🛞	Power Apps 🗸	Scheduling	양 Automal
0	SharePoint					
	Document Word	ge	5			

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

	SharePoint	Search in SharePoint	
G	+ Create site + Create new:	post	Choose where to publish news
۲	Following	News from sites	Frequent sites
	Training	*	RondaB
0	Student Curriculum Speciali		Student Curriculum Specialists
	Art Guild 2020-2021		Counseling Interview
	RondaB	*	Art Guild 2020-2021
\oplus	See all	News from sites RondaB Here you'll see news from sites you My currents interests	AG Art Guild

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: <u>Create A News Post and News post</u> <u>links</u>

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.

small "checkmark " to show permissions.

а

	Share "General"						?	\times
	은 Add a name, group, o	r email			I	-	0	~
	🖄 Add a message		Ø		edit e any cł	nanges		
	I		0		view t make	change	s	
			¥.		' t dow view, bu			ad
	(((((⊖ Co	py li	nk	र्छ	E	≥ Ser	nd
Shared with							1	

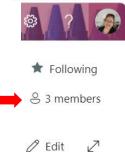
6. When finished editing, click the "Send" button.

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

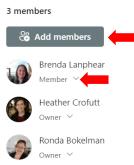
Adding Members to a Group

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

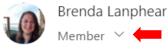


The members are shown. Notice the titles under names, Member and Owner. Members may be added here.

Group membership



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



Member \checkmark Heather Crofutt Owner \checkmark

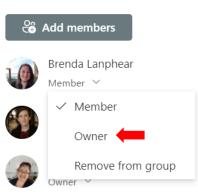


Ronda Bokelman _{Owner} ~

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".

Documents	1		See all
🗄 Edit in grid view	🖻 Share 🗢 Copy link 🔗 Pin to t	cop 🛓 Download	$ imes$ 1 selected $\buildrel =$ All Documents $\label{eq:linear}$ $\buildrel =$
🕑 🗋 Name 🗸	Modified		
General	运 … July 1	Ronda Bokelman	

2. Select "Copy Link".

Share "General	п	? ×
은 Add a name, gro	oup, or email	© ~
🖄 Add a message	_	
0000	Copy link හි	⊳ Send

- 3. Paste the link to the document
- 4. or enter the name, group, or email and click "Send". ▷ Send
- 5. To change any permissions for the link, select the link settings
 Share "General"
 ⁽²⁾ ×

Add a name, g	S Add a name, group, or email					
🖄 Add a message	5					
(0000)		⊖ Copy link	\$	▷ Send		

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.