# SharePoint 2016 External User Guide

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With SharePoint 2016 you can find out how easy it is for teams and individuals to create Web sites for information sharing and document collaboration. SharePoint sites allow users to work together on documents, tasks, contacts, events, and other information. A SharePoint site has a number of very powerful built-in features including shared calendar, task list, Newsfeed, web links, and document libraries. The beauty of this kind of site is that anyone who has access to the site can be given permissions to post information and it is as easy as saving a file or completing a form on a web site.

Logging in for the first time

SharePoint 2016 works in Microsoft Edge, Internet Explorer 11, Internet Explorer 10, Google Chrome, Mozilla Firefox and Apple Safari.

Steps:

1. In your browser Address field, type: https://workspace.richmondgov.com
2. Hit Enter on your keyboards. Your browser will launch the site for you.
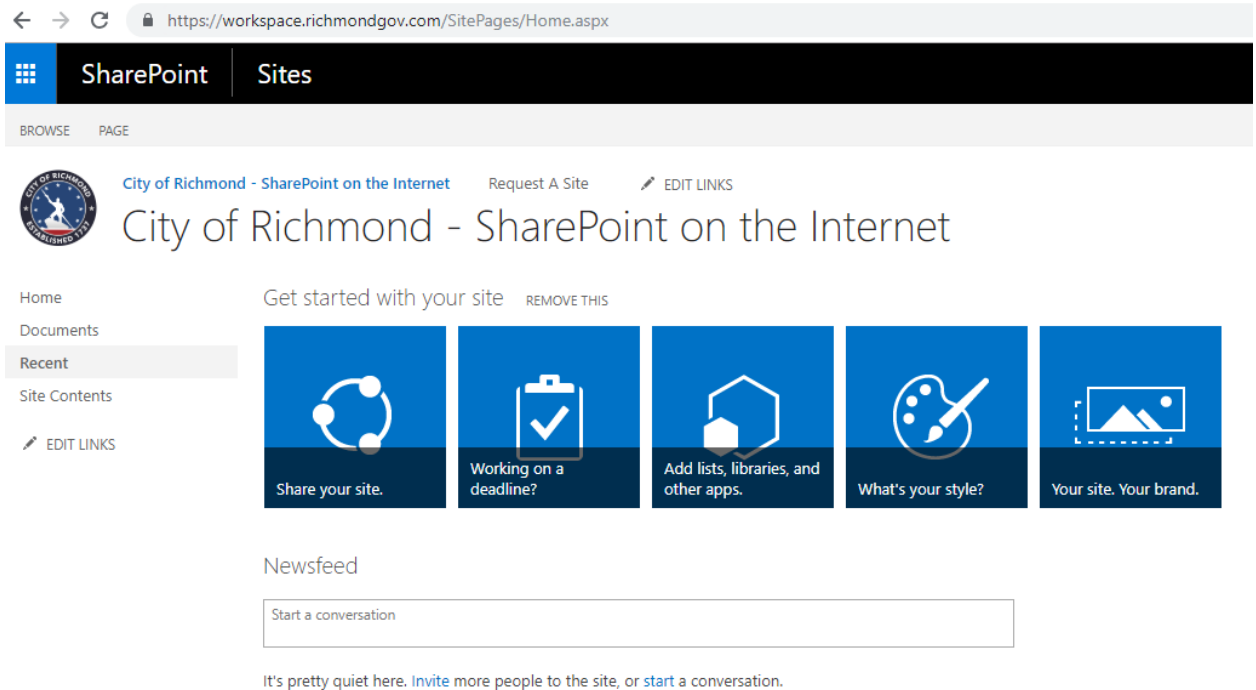
3. To go to your team's subsite, click on **Site Contents** in the Navigation menu on the left side.
4. You will be prompted to login
    a. As a City employee, choose Windows Authentication
    b. As an External user who will be a contributor of a site, choose Forms Authentication

Sign In

Select the credentials you want to use to logon to this SharePoint site:

▼
Windows Authentication
Forms Authentication

5. At the bottom of the page, you will see your site under the **Subsites** header

Subsites

⊕ new subsite

Ⓢ Circuit Court Clerk's Office

Ⓢ City Council

Ⓢ Department of Information Technology

Ⓢ Department of Public Utilities

Ⓢ Office of the Press Secretary

Parts of the Team Site

The team site is a group of web pages composed of separate areas of functionality. Some of the functions are displayed on the home page; others are displayed on pages within the site.

Requesting Site Access

Just because a site is listed does not necessarily mean that everyone has access. Access is granted by the particular Team Site Owner.

If you get the following screen, type that you need access to the site. The request will be forwarded to the DIT Site Administrator. The DIT Site Administrator will then inform you who the Team Site Owners are for site in which you need access. You will contact the Team Site Owner to grant you access.

You need permission to access this site.

Type your message here

Site Permissions

Permissions can be set on an entire Team Site, an individual document library or individual documents. The granular permissions will still only be given by the Team Site owners. Once a document is uploaded into a document library it will inherit the Parent Team Site permissions. It is important that you are clear before adding documents that you know the level of permissions you would want others to have.

Whoever requests the Team Site to be established will be loaded as the primary Team Site Owner. There should be at least two site owners. The owners share the same permissions in case the primary is absent, the secondary owner can take control of the site.

There are several levels of user security:

Team Owners - Team Owners can grant access by adding other team owners', members and visitors. The Team Site Owner can change the overall look of the Site, by adding columns and views.

Team Members – Can add content such as New Documents, Uploading documents, Announcements and Calendar events. They can also edit existing documents and content. Team Site Members cannot grant any level of access.

Team Visitors - Have viewing privileges only. They are limited based on the permissions granted by the owners.

Granular Levels of Security:

Parent Team Site Security- The parent site permissions will apply to all site content.

Document Library Security- You can grant access to certain groups or individuals as the Team Site owner to a specified Document library. For example, Documents is a document library that holds a list of documents. You could create another document library and grant it permissions. If you take away an individual or groups access to the library, they will no longer see the library but will still have access to the other areas of the site.

Document Security- You can grant access to certain groups or individuals as the Team Site owner to a specified document within a library. If you take away an individual or groups access to the document they will no longer see the document but will still have access to the other areas of the site including the document library.

Granting Site Access

As a Team Site Owner you will have the ability to grant access to your site to others. A site access request may come to via Outlook or a phone call. The user who is requesting access to your site may have already been notified by the DIT Site Administrator to contact you for site access. To grant site access, do the following:

1. Go to your site

2. Click on the gear at the top of the page, on the left side of your name.
3. Select Site Settings
4. Under Users and Permissions, click People and groups

Users and Permissions
People and groups
Site permissions

5. On the left side, you will see a list of groups under the Groups section.
6. Select the group in which the user's access should be granted.
7. Click the New tab
8. Type the user's name and click the Share button

9. The user now has access to your site.

Requesting a Site

Requesting a Site is fairly simple. Once you request a Team Site the information is forwarded to the appropriate section and you will be contacted so that you can meet with the persons (Project Lead) who will assist you with your site specifications. The Project Leader will ensure that all of the specifics are feasible to be placed on your SharePoint site.

Steps:

1. From the City of Richmond SharePoint Site home page, click on the **Request A Site** tab.

2. Click the **new item** button. The SharePoint Site Request form opens.

Requester *

Include full name of the person as it is displayed in the City's email directory

Requester Network Login *

ID used to login to the City's network (For example: RICHVA\username or username)

Requester Phone Number *

DIT Office Phone Number (For example: 8046466938 or (804) 646-6938)

DIT Project Leader *

Select... ▼

The DIT Project Leader whom supports your department

Agency *

Name of the agency requesting the SharePoint site

Site Name *

This is the title for your new site. The title will be displayed on each page in the site.

Site Description *

Short description of the site and the purpose for the site

URL Name *

This is the name that will be used to access the SharePoint site through an internet browser. It must be short and should be easy to remember for facilitating site access. It cannot contain more than 20 characters and may only contain alphanumeric characters and underscores.

Site Type *

Team Site ▼

Type of SharePoint site that has to be created.

Team Site is a site for teams to quickly organize, author, and share information. It provides a document library, and lists for managing announcements, calendar items, tasks, and discussions.

Document Workspace is a site for colleagues to work together on a document. It provides a document library for storing the primary document and supporting files, a tasks list for assigning to-do items, and a links list for resources related to the document.

Meeting Workspace is a site to plan, organize, and capture the results of a meeting. It provides lists for managing the agenda, meeting attendees, and documents.

Blog Site is a site for a person or team to post ideas, observations, and expertise that site visitors can comment on.

Wiki Site is a site for a community to brainstorm and share ideas. It provides Web pages that can be quickly edited to record information and then linked together through keywords

Project Tracking Site is a site for teams to track multiple projects. It provides

lists to track general project information, project tasks, and project issues.

Initial Owners of the Site *

Enter names or email addresses...

Must have at least two owners of a site. Owners have full control permission

Initial Members of the Site *

Enter names or email addresses...

Members can add, edit, and delete items in existing lists and document libraries.

Initial Visitors of the Site

Enter names or email addresses...

Visitors have read-only access to the site

Display this site on the Quick Launch? *   ○ Yes
○ No

Save   Cancel

3. Complete all sections with an asterisk which ae required fields. Once you have finished completing the form, click **Save**.

Create SharePoint sub sites

Any site that is created in SharePoint is a **subsite** since it will reside under some other site in the site hierarchy. The only site that is a true site and not a subsite is the very top site of the site collection since it does not appear under any other sites. So really, the only site you have in the environment is the root of your site collection (City of Richmond-SharePoint Site). All the other sites in the environment (department sites, project sites, team sites, etc.) are all subsites.

The picture is worth a thousand words, so hopefully below image clarifies it even further.
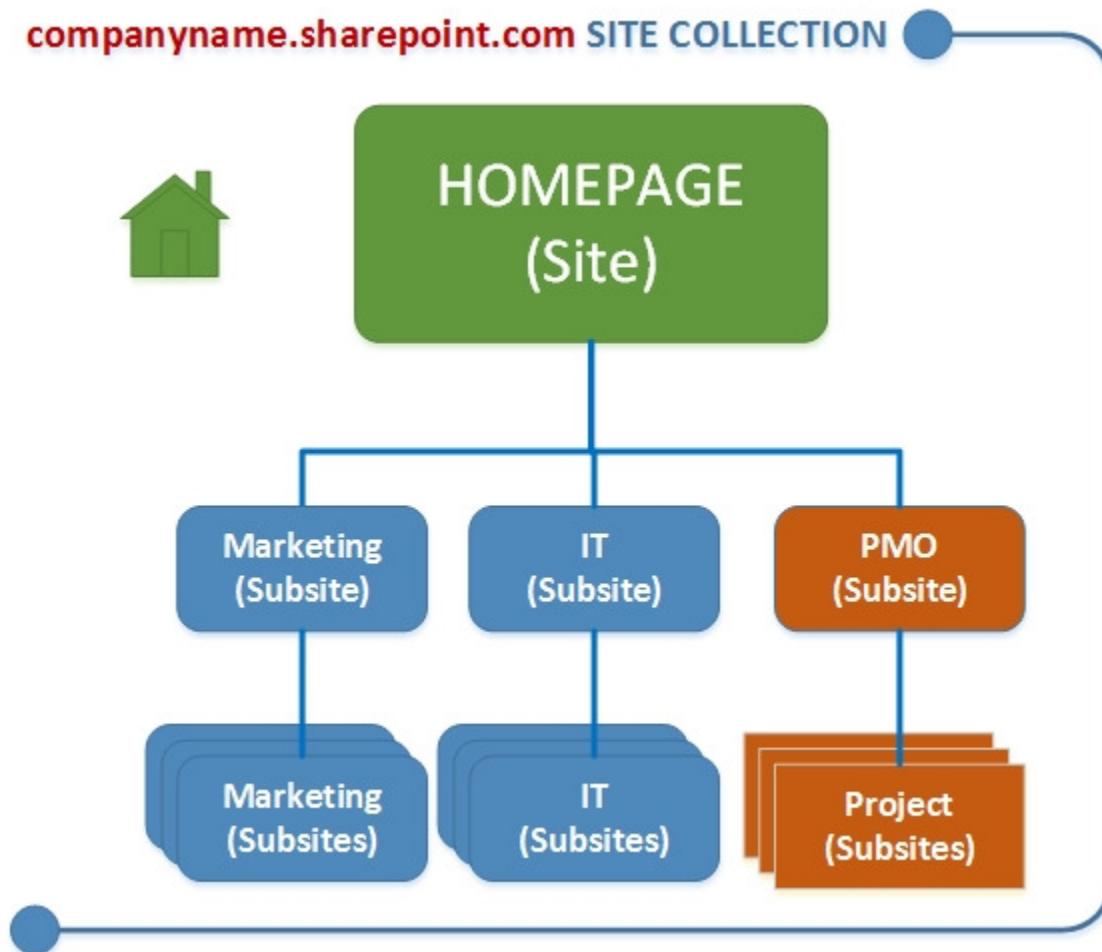
A DIT Site Administrator creates the top-level site (for example, PMO). The Team Site Owner of PMO site can create subsites (for example, Project). To create a subsite, follow the steps below.

Steps:

1. Go to your site

2. On left side, click **Site Contents**
3. Under **Subsites** section, click **new subsite** button

4. Complete the form.
    a. Title is the new site name.
    b. Description is the purpose for the site
    c. URL name is used to access the SharePoint site through an internet browser. It must be short and easy to remember. It cannot contain more than 20 characters and may only contain alphanumeric characters and underscores.
    d. Template Selection:

     i. Team Site is a site for teams to quickly organize, author, and share information. It provides a document library, and lists for managing announcements, calendar items, tasks, and discussions.

     ii. Blog is a site for a person or team to post ideas, observations, and expertise that site visitors can comment on.

     iii. Project Site is a site for teams to track multiple projects. It provides lists to track general project information, project tasks, and project issues.

     iv. Community site is a site which is used for topic discussion with other team members.

e. User Permissions. Choose **Use unique permissions** to give the subsite its own permissions unless there's a reason for the subsite to inherit permissions from the parent site. Giving the subsite its own permissions is easier to manage.

Create a List on a Site

A list in a SharePoint site is a collection of information that you can share with team site members and visitors depending on their permissions.

NOTE: To add, edit, or delete items in a list, you must have permission to contribute to the list.

Steps:

1. Go to your site
2. On left site, click Site Contents
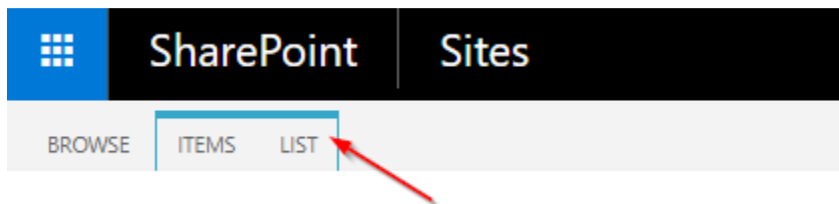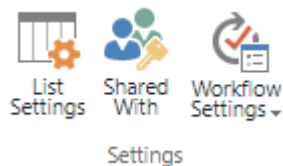3. Under **Lists, Libraries, and other Apps** section, click **add an app** button

4. Click Custom List and give it a Name.
5. Your new SharePoint list will appear on your site's Quick Launch (left side navigation).

Create columns in a list
1. Go to your SharePoint List
2. At the top of the page, click List tab

3. At the top of the page, under Settings, click **List Settings**

4. Here, you would create columns for your List

Columns

A column stores information about each item in the list. The following columns are currently available in this list:

Column (click to edit)	Type	Required
Title	Single line of text	✓
Modified	Date and Time	
Created	Date and Time	
Created By	Person or Group	
Modified By	Person or Group	

- ▫ Create column
- ▫ Add from existing site columns
- ▫ Column ordering
- ▫ Indexed columns

5. Click Create column link

NOTE: For each column you create for the List, you'll have to click the Create column link

6. In this form, you will name the column and select the type of column.

Settings · Create Column ⓘ

Name and Type

Type a name for this column, and select the type of information you want to store in the column.

Column name:

The type of information in this column is:
- ⦿ Single line of text
- ○ Multiple lines of text
- ○ Choice (menu to choose from)
- ○ Number (1, 1.0, 100)
- ○ Currency ($, ¥, €)
- ○ Date and Time
- ○ Lookup (information already on this site)
- ○ Yes/No (check box)
- ○ Person or Group
- ○ Hyperlink or Picture
- ○ Calculated (calculation based on other columns)
- ○ Task Outcome
- ○ External Data
- ○ Managed Metadata

Additional Column Settings

Specify detailed options for the type of information you selected.

Description:

Require that this column contains information:
- ○ Yes ⦿ No

Enforce unique values:
- ○ Yes ⦿ No

Maximum number of characters:
255

Default value:
- ⦿ Text ○ Calculated Value

☑ Add to default view

⊞ Column Validation

OK   Cancel

Editing an item in a List

Editing existing items in a list can also be called updating existing site content.

Steps:

1. Go to your SharePoint List
2. You will see the data displayed in your list
3. You can edit the items two ways:
    a. First Approach

        i. Click on the ellipsis ••• next to the item you want to edit
        ii. Select Edit Item
        iii. An Edit form will display with the items from your list.
        iv. Edit whichever item from your list and click Save
    b. Second Approach

        i. Click the edit this list button
        ii. This way to can edit items in bulk instead of one by one

        iii. Click Stop editing this list to save what you've edited

Working with Document Libraries

Document Libraries is a repository for your usage when dealing with existing and future documents. You can use document libraries to store your documents on a SharePoint site rather than on your local hard drive so that other employees can find and work with them more easily. Libraries are used to store files whereas lists are used to store other types of content. These stored files should be given certain security features when created and loaded into SharePoint.

Your document libraries can have names that reflect your current folder structure on your shared drive as well as the names of current projects. Working with your DIT Project Leader when creating the site will help you in deciding what structure works best for your agency.

Versioning

You can control the integrity of documents within your Document Libraries using this Versioning feature. It allows you to have an audit history of your document and gives you control over when edits are made.

The audit trail will give you specific information about the document, who worked on it and when they worked on it.

# Granting Granular Permissions

Document Library Security

Document Libraries by default inherit the parent Team Site permissions unless you change the permissions when uploading it to the SharePoint Team Site. Only Team Site owners can change permission on any level. Team Site Members and Visitors will need to refer to the site owner if their permission should be changed.

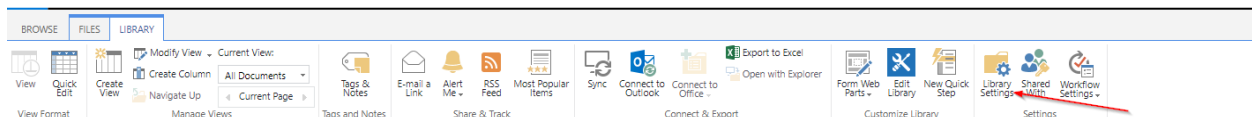**Changing Document Library Security**

1. Click **Documents** tab to access the Document Library you need to change permissions on.
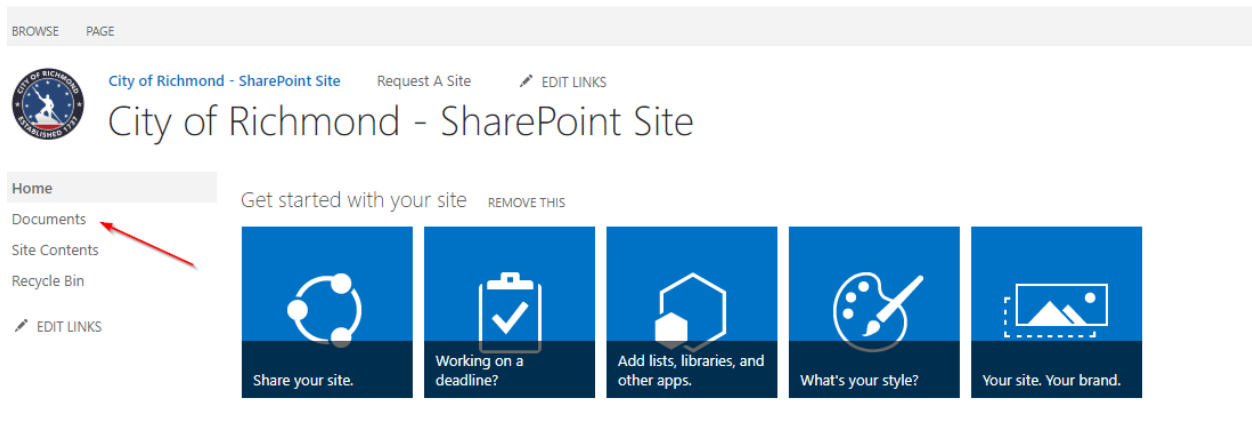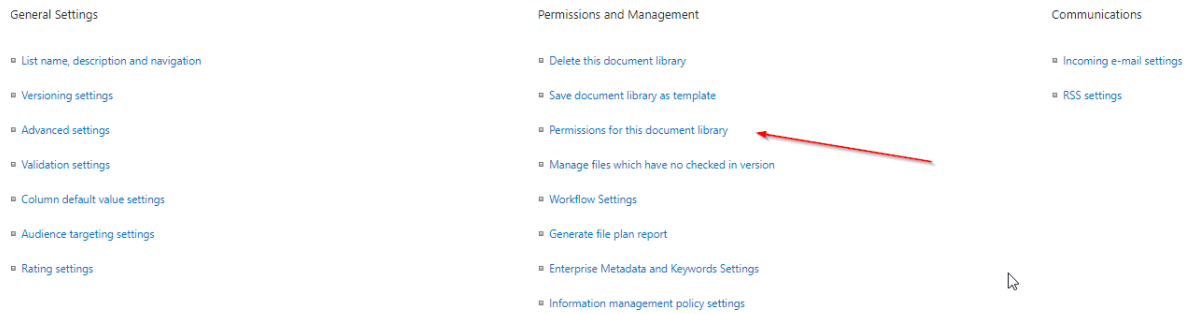

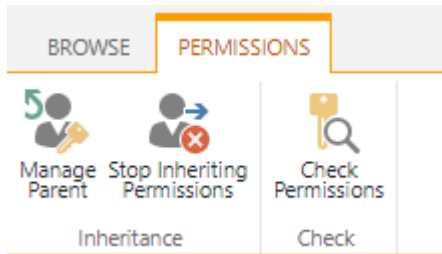2. Click Library tab at the top of the page.
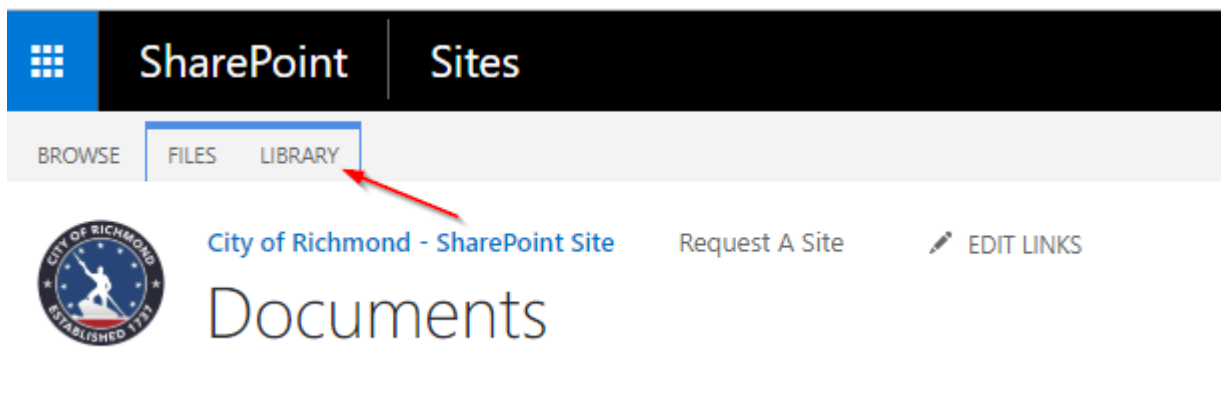
3. Under Settings category, select Library Settings button

4. Go to Permissions and Management, click Permissions for this document library

General Settings

▫ List name, description and navigation

▫ Versioning settings

▫ Advanced settings

▫ Validation settings

▫ Column default value settings

▫ Audience targeting settings

▫ Rating settings

Permissions and Management

▫ Delete this document library

▫ Save document library as template

▫ Permissions for this document library

▫ Manage files which have no checked in version

▫ Workflow Settings

▫ Generate file plan report

▫ Enterprise Metadata and Keywords Settings

▫ Information management policy settings

Communications

▫ Incoming e-mail settings
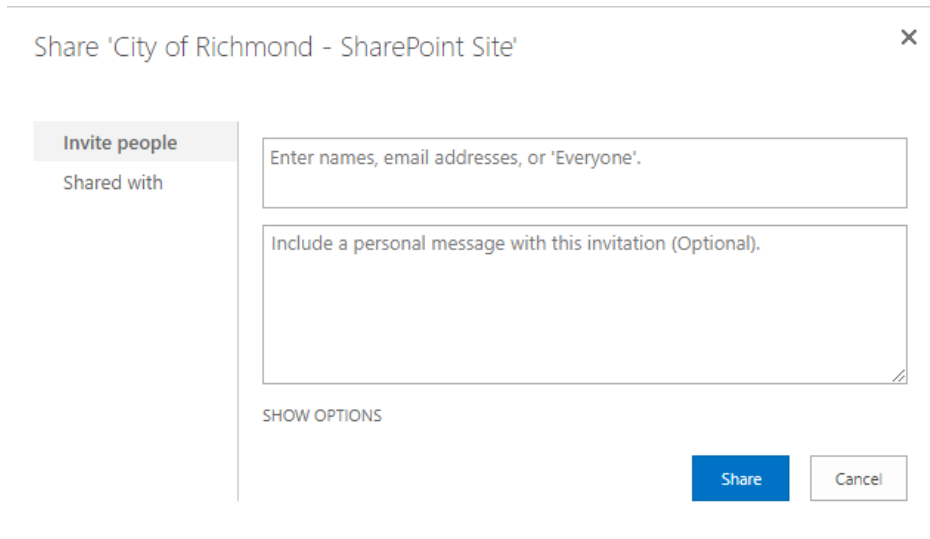
▫ RSS settings

5. Under Permissions tab, click Manage Parent

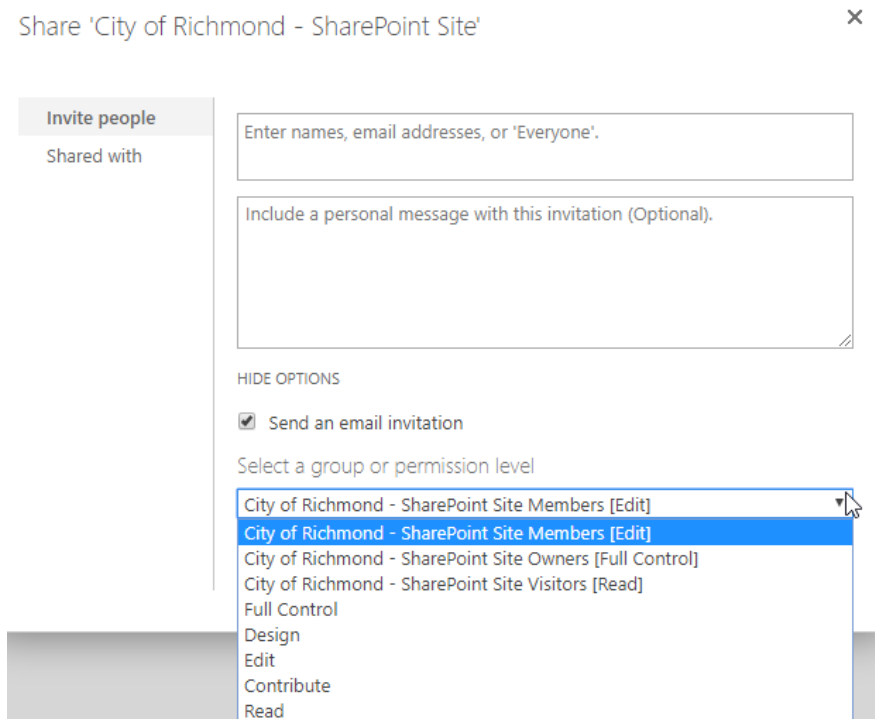6. Under Permissions tab, click Grant Permissions
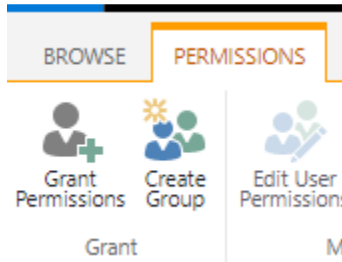
7. Type user's name

8. Click Show Options
9. Under **Select a group or permission level**, you can add the user to a specified site group or explicitly grant permissions.

10. Click Share button once you've granted the user permission to the document library.

Document Level Security

<u>Changing Document Level Security</u>

1. Select the document library that contains the document in which you want to grant explicit permissions
2. Next to the document, click the ellipsis ···
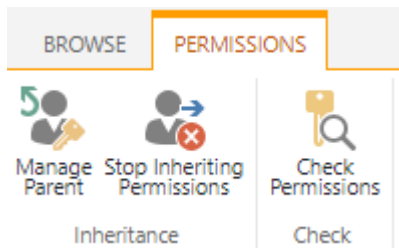3. Click **SHARE**

4. Click **Shared with** on the left side
5. Click **ADVANCED**
6. Under Permissions tab, click **Stop Inheriting Permissions**

7. Select the users or groups in which you do not want to have access to the document
8. Under Permissions tab, click **Remove User Permissions**

9. The users or groups will be removed

10. Under Permissions tab, click **Grant Permissions**

Invite people

Shared with

Enter names, email addresses, or 'Everyone'.

Include a personal message with this invitation (Optional).

HIDE OPTIONS
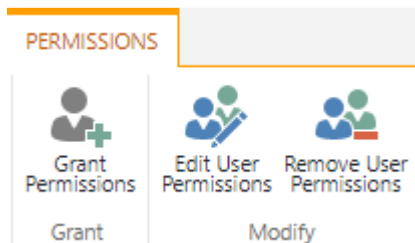
☑ Send an email invitation

Select a permission level
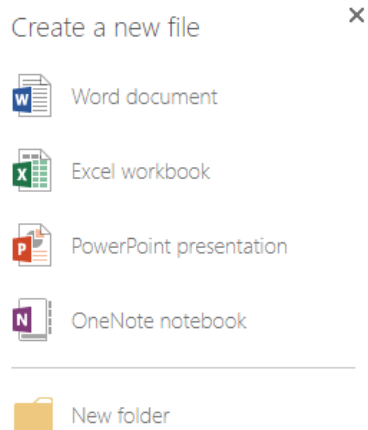
Edit ▼

Share   Cancel

11. Type the user's name
12. Select the permission level for the user
13. Click the Share button
14. The user will have explicit access to the document

Create a file in a Document Library

SharePoint is interfaced with Office Online Server which is an Office product that provides browser-based versions of Word, PowerPoint, Excel and OneNote. Therefore, you can create a new file from within a library, instead of having to work outside of SharePoint.

Steps:

1. Open your document library by clicking Documents from the Quick Launch
2. Click the New button ⊕ New
3. Select the Microsoft file

Create a new file   ✕

W Word document

X Excel workbook

P PowerPoint presentation

N OneNote notebook

     New folder

4. Add the text and other items that you want to your file.
5. Any changes to the document is saved automatically.
6. To perform a Save As, click the File menu and click Save As

Delete a file from a Document Library

1. Open your document library by clicking Documents from the Quick Launch
2. Select the document that you want to delete
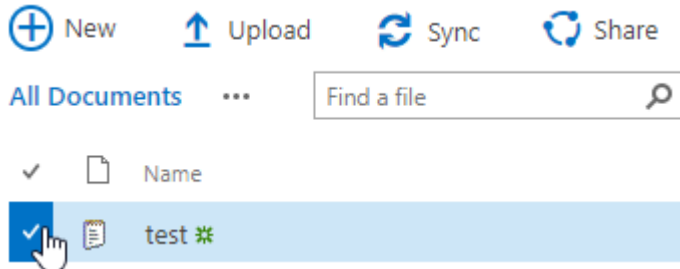
3. At the top of the page, click Files
4. Under Manage category, select Delete Document
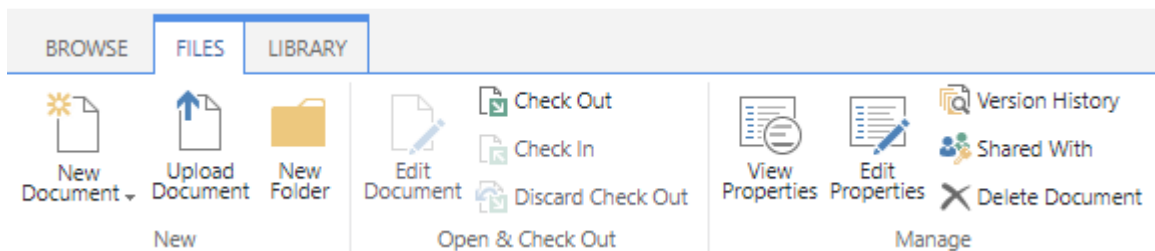
5. Click OK from screen below

Upload a file to a Document Library

1. Open your document library by clicking Documents from the Quick Launch

2. Click the Upload button ⬆ Upload

3. Browse to the document that you want uploaded and click OK

Add a document   ✕

Choose a file | Choose Files | No file chosen |

                       ☑ Add as a new version to existing files

Version Comments

                       [   ]
                       [   ]
                       [   ]
                       [   ]

 | OK | | Cancel |

Checking out and editing a file

When you Check Out a file, you ensure that others cannot make changes to the file while you edit it. If you do not check out a file before you edit it, someone else could edit the file while you are working on it. When two or more people are working on a file at the same time, it is possible to accidentally overwrite each other's changes. With Versioning, other users will not see your changes until you check the file back in.

Steps:

1. Open your document library by clicking Documents from the Quick Launch

2. Select the document that you want to check out by clicking on the ellipsis ···
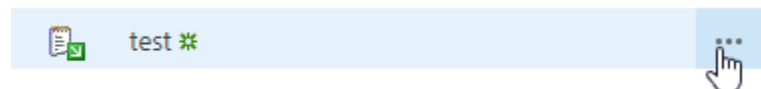
3. Click on another ellipsis and follow the screenshot below
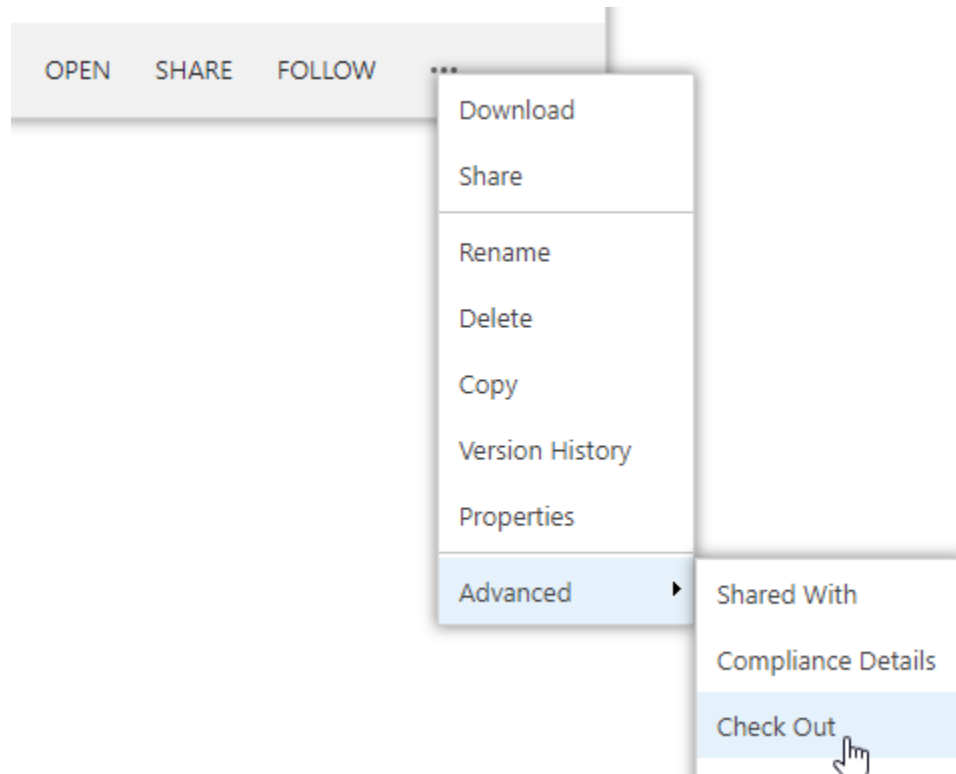
When any file is checked out, the icon for the file in the library changes to indicate that the file is checked out.

test ✳

Alert Me

Alerts notify you when information that interests you is added or updated on the team site.

An alert can be added to track these types of items:

- Document Uploads
- SharePoint Document Library changes
- List items

Alerts are important tools for team site users. As information from diverse sources is pulled together, sifting through so much content can be a time-consuming task. Alerts provide a proactive solution to staying informed.

The team site sends alert results whenever changes are made to the content that you added an alert for. You can view alert results on the team site or receive them in e-mail messages. You can specify how frequently you want to receive alert results by e-mail and receive them immediately, as a daily summary, or as a weekly summary. When you no longer need to follow changes for the item, you can delete your alerts at any time.

Setting a Document Library Alert

1. Select your Document Library from the Quick Launch bar
2. Click Library tab
3. Under Share & Track, click Alert Me
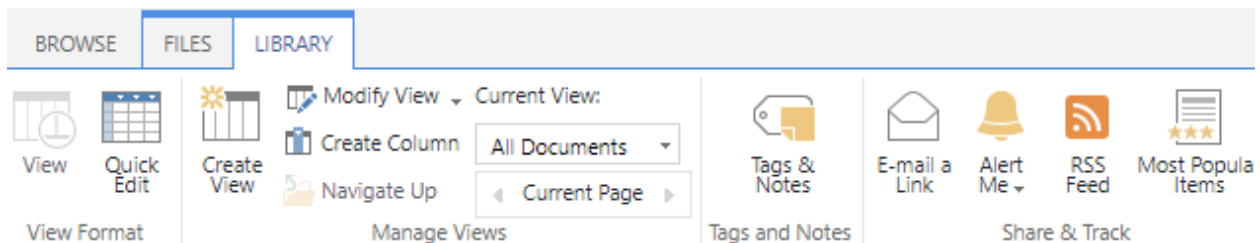
4. Click **Set alert on this library**
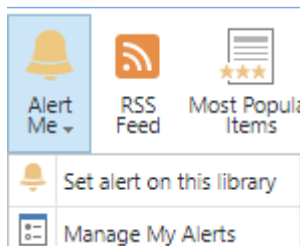
5. Complete the form

Documents - New Alert

✕

OK   Cancel

Alert Title

Enter the title for this alert. This is included in the subject of the notification sent for this alert.

Send Alerts To

You can enter user names or e-mail addresses. Separate them with semicolons.

Users:

Enter names or email addresses...

Delivery Method

Specify how you want the alerts delivered.

Send me alerts by:

◉ E-mail   Michele.Dubose@Richmondgov.com

○ Text Message (SMS)

☐ Send URL in text message (SMS)

Change Type

Specify the type of changes that you want to be alerted to.

Only send me alerts when:

◉ All changes

○ New items are added

○ Existing items are modified

○ Items are deleted

Send Alerts for These Changes

Specify whether to filter alerts based on specific criteria. You may also restrict your alerts to only include items that show in a particular view.

Send me an alert when:

◉ Anything changes

○ Someone else changes a document

○ Someone else changes a document created by me

○ Someone else changes a document last modified by me

When to Send Alerts

Specify how frequently you want to be alerted. (mobile alert is only available for immediately send)

◉ Send notification immediately

○ Send a daily summary

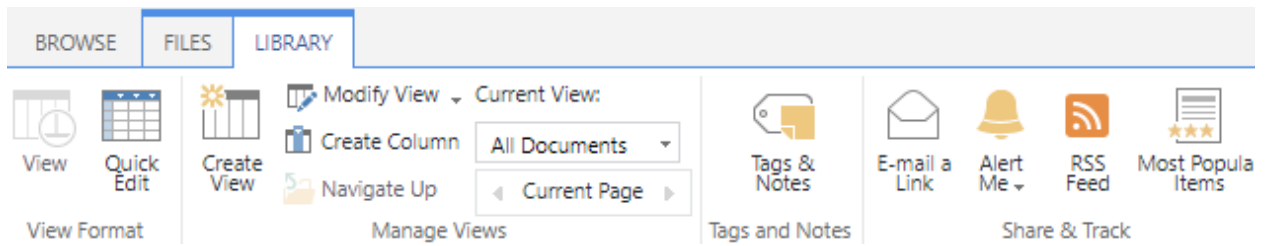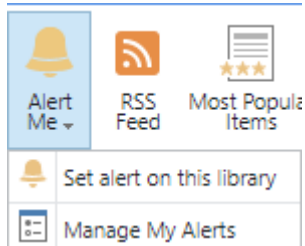○ Send a weekly summary

Time:

Wednesday ▼   1:00 PM ▼

OK   Cancel

Deleting a Document Library Alert

1. Select your Document Library from the Quick Launch bar
2. Click Library tab
3. Under Share & Track, click Alert Me

4. Click **Manage My Alerts**

5. You will see your alerts
6. Select the alert that you want deleted
7. Click **Delete Selected Alerts**

Alert Title

Frequency: Immediate

☐   Documents

Creating a View

You can use views to see the files that are most important to you or that best fit a purpose. For example, you can create views of the files that were created most recently, files from a specific department, or files that were created by a particular person. After you create a view, it is always available when you look at a library.
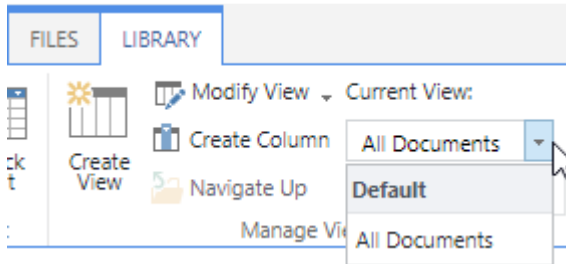
Libraries can have personal views and public views. Anyone can create a personal view to see the files in a certain way or to filter for only the files that they want to see. If you have permission to design a site, you can create a public view that anyone can use when viewing the library.

Steps:

1. If the library is not already open, click its name on the Quick Launch.
2. Click **Library** tab
3. Click **Create View** under **Manage Views** category
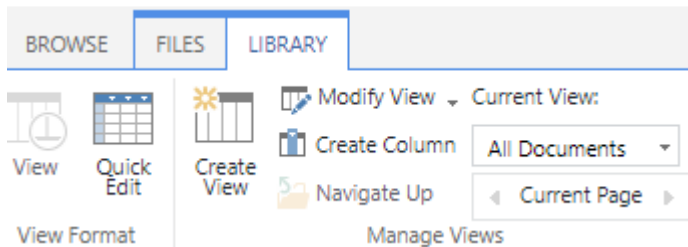
4. Choose a view type
5. Complete the form