SharePoint Help Document

Contents
Location ..................................................................................................................................... 1
Training ...................................................................................................................................... 1
Request Users and/or Access .................................................................................................... 2
Working with Documents ........................................................................................................... 2
  Post a document .................................................................................................................... 2
  Add/Create a new document .................................................................................................. 3
  Deleting Documents/Folders ................................................................................................. 3
  Sharing Documents ................................................................................................................ 4
  Editing Documents ............................................................................................................... 7
  Versioning ................................................................................................................................ 8
Subsites/Additional Pages ........................................................................................................ 8
Working with SharePoint documents using File Explorer ........................................................... 8
Move or Copy document to new location ................................................................................. 10
Set up Alerts on pages .......................................................................................................... 11
SharePoint: Configure Document Library So PDFs Open as PDFs (Instead of in Built-In Word Editor) ....................................................................................................................................... 12
Custom Lists to Excel ............................................................................................................ 14

Location

https://sharepoint.nebraska.gov/dnr/home/SitePages/Home.aspx

Training

1. General Information
   a. https://sharepoint.nebraska.gov/ocio/home/training/SitePages/Home.aspx. Set up by OCIO for users. There are also some short articles/videos on the left.
b. Linkedin Learning through Employee Development Center (link on above site)-
%2fnebraska.csod.com%2fLMS%2fLoDetails%2fDetailsLo.aspx%3floid%3dd713
ff35-1a5a-4329-baad-78aae0e317d9#t=1

2. Co-authoring/versions https://support.office.com/client/training-introduction-to-document-
libraries-2689f967-3c61-4535-a38a-
45a0c313d55e6?NS=WSSENDUSER&Version=15&AppVer=OSU150

Request Users and/or Access

1. All DNR employees have read only access to the site.
2. Read/Write/Delete/Add granted to sections on section specific pages.
3. Users must be granted access to site/pages/documents
4. Request a new user. Complete a DNR Service request through OCIO Service Portal
   Requests. Include:
   a. Name including middle initial (in case it is a duplicate name)
   b. Email address
   c. Phone number
   d. Where they need access
5. Login with your stn credentials, first.lastname and use your password you setup. If you
   cannot get in, try adding "stn\" to your login, ex. stn\first.lastname

Working with Documents

Each section page was designed with a Newsfeed area and a Documents area.

Post a document
1. Drag files to folder area

   Documents
   @ new document or drag files here

   Name

   ©Gisterver\NotReleased\ToPublic

   ...  

2. Message will display when moving document over area, “Drop Here”.
3. When document has uploaded, message will display, “Upload Completed”

![Image of upload completed message]

4. DISMISS just removes the upload message.
5. Cannot post to areas where permission not granted

Add/Create a new document

1. Select new document on right side of page

![Image of selecting new document]

2. Select file type.
   a. Word document
   b. Excel workbook
   c. PowerPoint presentation
   d. OneNote notebook
   e. New folder – create folder under new documents area.
      i. New folders allow for better organization

![Image of creating a new folder]

3. Word, Excel, PowerPoint and OneNote:
   a. Name the document
   b. Will open in a web version to create a new document
   c. Saving is just to SharePoint.
4. Cannot add to areas where permission not granted

Deleting Documents/Folders

1. Click the ellipses “…” next to document or folder
2. Click the ellipses “…” in box that opens up

3. Cannot delete other users documents

Sharing Documents

1. Click the ellipses “…” next to document or folder

2. See who it is shared with and then send email to share

   a. Click on “lots of people”
b. View listing

c. Invite People

d. Complete email information
e. **Invite people with an AD account, name must be within drop down**

f. **Outside individuals with AD accounts also show up on the list**

g. **Cannot invite people without AD account**

3. **Send email to share**

   a. **See emailing information directly above**

4. **Email received**

   a. **Click on link in email to go directly to the document**
Editing Documents

1. Can only edit documents shared with user.
   a. Only people on this list can edit document
   b. Can easily communicate with everyone the document is shared with by using Email Everyone.

2. Shared users open a document and have edit permissions

3. Non-shared users open a document and can view it.
Versioning
Sites can be set up for versioning. This is not a default setting. The following are the options available:

Settings → Versioning Settings

Subsites/Additional Pages
1. Subsites can be added below section pages
2. Subsites can be set up with unique permissions
3. Access to a subsite does not give user access to any other part of the site.

Working with SharePoint documents using File Explorer
To access documents and move documents around on SharePoint using file explorer, setting up mapped network drives is an easy option. You need Contribute permissions to the page, home page does not work.

The network drive is mapped from just part of the address of the page. Only map yellow highlighted area.
https://sharepoint.nebraska.gov/dnr/home/diroffice/dirrev/_layouts/15/start.aspx#/SitePages/Home.aspx

Steps to take:

1. Copy website address, but only up to folder that you want to map, not the entire url. Can NOT map to Home (DNR main page) due to file permissions. To map WP sharepoint page use this part of the url https://sharepoint.nebraska.gov/dnr/home/WP, NOT entire address https://sharepoint.nebraska.gov/dnr/home/WP/_layouts/15/start.aspx#/SitePages/Home.aspx

2. Open File explorer
3. Network
4. Right click on Network, Map Network Drive
5. Choose drive name, pick any letter not already assigned.

6. Finish.
7. It might ask for log in information when you try to log in after your computer has been disconnected from state system or rebooted.
8. Final look

9. Opening in File Explorer. Pages are listed as folders
10. Documents posted on the pages are located under Shared Documents

Move or Copy document to new location

1. Move only works if you posted the document. Otherwise you can copy and delete documents if you have edit permissions in folders.

2. Highlight document(s), select Copy to and Choose location…

3. Choose your map drive

Select the place where you want to copy How to Use Skype, then click the Copy button.
4. To post under documents choose Shared Documents or subsites, further down to folder if needed.

Set up Alerts on pages
To set up an alert on a page, this is done by the individual.

1. When you are at the SharePoint location, click on Page in upper left.

2. Then click on Alert Me.
   a. Set an alert on this page, options will open that you are able to choose from.
   b. Manage My Alerts
SharePoint: Configure Document Library So PDFs Open as PDFs (Instead of in Built-In Word Editor)

1. Open the settings page for the Document Library. There are multiple ways to get the Document Library's settings page; one is to open “Site Settings,” then click “Site libraries and lists,” then “Customize “[theNameOfYourLibrary]”.” In this example, the Document Library is called “TEMPforDemoPurposes.”

![Settings Menu]

3. In the Advanced Settings, next to “Opening Documents in the Browser,” select “Open in the client application.”

![Advanced Settings Menu]
4. Scroll to the bottom of the Advanced Settings page and click “OK” to save your changes.

Custom Lists to Excel
Export a custom list to Excel:
Navigate to your custom list and click the List tab to expose the ribbon. It will present a panel telling you must have a Microsoft SharePoint Foundation Compatible application. Click ok.

Then you'll see it's created a download file, in your default download folder.
Then one more panel, click enable and it will populate the file. You can see where it will be on the File path.