SharePoint Teams Sites Basic Tips and Tricks

Browser settings

- For the most functionality use the latest version of Internet Explorer Using Chrome, Firefox and Safari may provide limited access: http://technet.microsoft.com/en-us/library/cc263526.aspx

Avoiding Multiple Logins

To avoid logging in multiple times, add the SharePoint domain (https://teams.stonybrook.edu) to your Local Intranet Zone Sites on your Internet Explorer browser

1. In Internet Explorer, go to **Tools** > **Internet Options**
2. Click on the **Security** tab
3. Click on the **Local Intranet** zone icon and then the **Sites** button
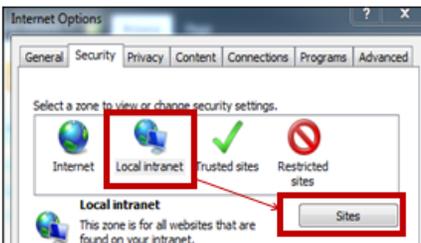
4. Click the **Advanced** button.
5. Click the **Add** button to add the sites:
   https://teams.stonybrook.edu and https://ecteams.stonybrook.edu
6. Click the **Close** button; then **OK** and **OK**.

Logging in with your NetID

- Your username is: sunysb.edu\NetID
  *Be sure to use the backslash " \ " above the Enter key
- Your password is your NetID password

The Ribbon

- If you use MS Office applications such as Word and Excel you are already familiar with the Ribbon. In SharePoint the Ribbon changes depending on where working. For instance, when you are in a Document Library you will have tools for working on documents and tools for managing the Library. In a List you will have tools for managing the list and tools for working with items in the List.
- Click the tab to the right of Browse to view the tools on the Ribbon.

Document Libraries: A document library is a place to sore files for others to access and edit

- View a document by clicking on it:
  - If it is a MS Office document and the Office Wed App feature is enabled for this Library, the document will open directly in SharePoint. Otherwise, the document will open in the associated application.
  - With the Office Web App feature multiple users can edit the document at the same time.
    - To edit a document click on "Edit in Browser". Your changes will be
  - saved automatically. Certain formatting may not appear in Edit in Browser view and the tools on the Office Ribbon are limited. To work around this open the document in its application.
    - For more functionality, click on "Open in Word, Excel, PowerPoint, etc" button. This will open the document in its associated application.

- If you are editing in the associated application remember to click **File** > **Save** to save the document back to the SharePoint site. There will not be a copy of it on your computer.
  - Note: the green arrows on the Save button: This lets you know that you are saving the document onto the SharePoint site (in the cloud).
- To add a document to the Library click **+ Add document**.

## Checking out a document to edit it

Some document libraries require you to check out a document prior to editing it. This prevents users from working on the same document at the same time.

To check out a document, you must open the document in its application (not the browser).

1. Click on the document in SharePoint and click the button "Open in Word [etc.]" (not Edit in Browser).
2. Select "Check out and Edit".

- If you select "Use my local drafts folder". This will save a copy of the document to your computer. This document will stay on your computer until you check it back in.

*If you view a document first (in the application) and then decide to check it out and edit it, there will be a
Check out button on the document:
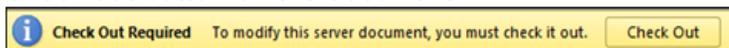
The green arrow icon before the document means it is checked out.

Checking in a document

If check out is required to edit a document, then you must check the document back in for others to see the changes.

In the document's associated application (Word, Excel, PowerPoint, etc), check in the document under
File > Info > Check in:
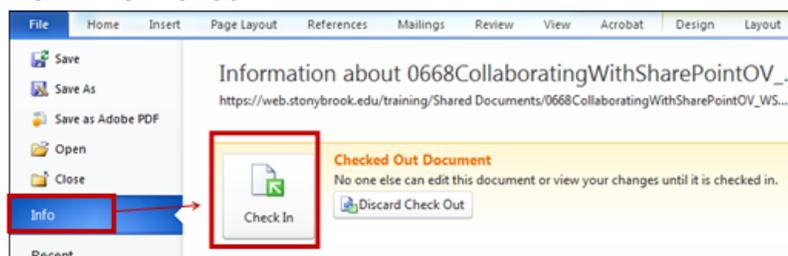
The Discard Check Out button - If you checked out a file (whether you made changes to it or not), you can discard this check out if you decide not to use it. All changes you made to the document will be lost.

Deleting a document

Hover over the document name > click the downpointing arrow (▼) > click **Delete**.

Finding a deleted document

In the Quick Launch (in the left pane of the SharePoint site) click on Recycling Bin to access all deleted documents.

- **Restoring a document**: Select a document by putting a check next to it and clicking **Restore Selection**.
- **Deleting a document completely**: Select the document and click **Delete Section**. This document will not be recoverable.
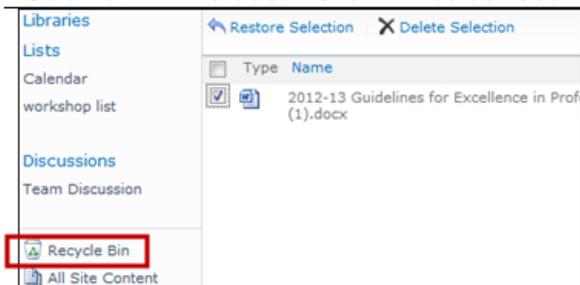

Accessing a previous version of a document

If versioning is enabled, you can access a previous version of a document by hovering over the document, clicking the down-pointing arrow (▼) and then choosing a previous version.

OR

Select the document and choose **Version History** from the Documents Ribbon:
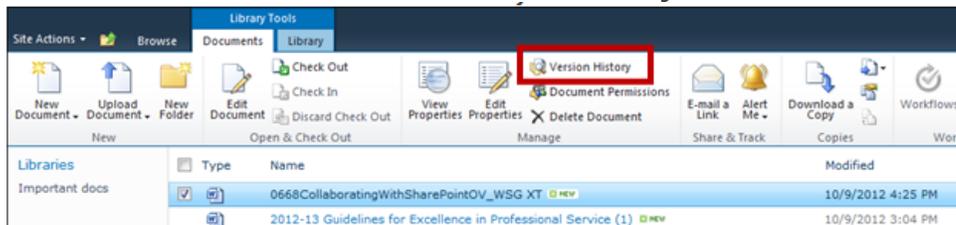

List basics

SharePoint lists store and display many different types of data. For example, it can be a list of projects being worked on by different people in your department, a list of links, a list of vendors and their contact information, a task list, etc.

Click on the **name** of this list to view the list items. Add an item to the list by click on **+ Add new item**.

OR

Click the **List** tab, in *List Tools* > **Datasheet** view to enter items directly into the list. Datasheet view allows you to tab over to the next cell. Datasheet view is especially useful for editing many items in a list.

* Datasheet view may not work using the 64-bit version of Office 2010. Download this plugin to be able to use Datasheet view: http://www.microsoft.com/en-us/download/details.aspx?id=23734. Datasheet view may not work if you are using a Mac.
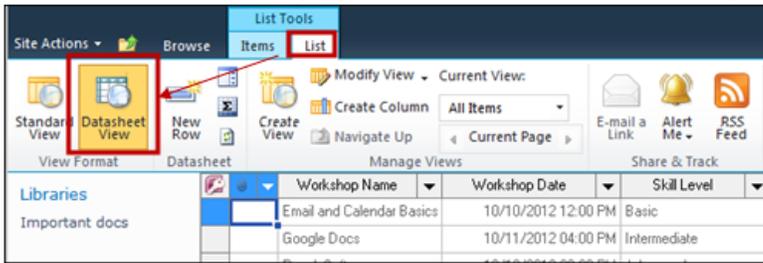

Sorting and filtering list items

In either Standard View or Datasheet View, you can sort and filter list items.

Simply hover over a column name > click the downpointing arrow (▼) > choose whether to:

- Sort the items in Ascending (A to Z) or Descending (Z to A) order
- Filter by the data given
  *To clear out the filter, click **Clear Filter** from [*column name*]
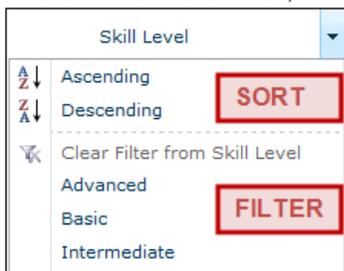

Creating a Custom View for your list

You can customize any list to display only the content you want to see. This is especially useful if the list has many columns and lots of data but you only want to see a portion of this data. You can make this list view public for all users of the site or private just to you. And you can designate if this view should be the default view.
http://youtu.be/Z3AaQT4B-NM

Click on the name of the list to begin

1. Click on the **List** tab under **List Tools**
2. Click **Create View**
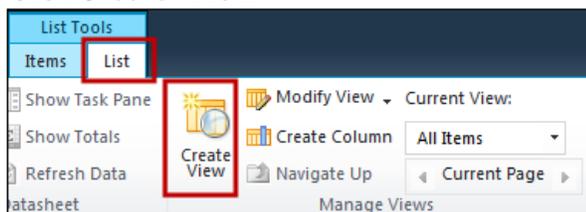
There are 6 format types. Choosing Standard view will allow you to scale down the current list to just the columns you want to see.
3. Using Standard View format as an example, you can:

- ○
  - **Name:** give this new view a name and make this the default view (or not)
- ○
  - **Audience:** choose whether this is a public or private view and then choose which columns to display (Column Name) and in what order (Position from Left)
- ○
  - **Sort** a column in ascending or descending order.
- ○
  - **Filte**r based on data in any of the columns in the list regardless if you choose to display them or not in your view. For example, you may choose to filter by a column of numbers but only display data that is greater than a specific amount. To turn on a filter like this select "Show all items only when the following is true" and then select your criteria. To turn on the filter in this view select "Show all items in this view".

Best Practice: Don't make your custom view public until you've viewed and perfected it. To edit the list, click on the **List** tab under *List Tools* > **Modify View**.

Changing Your SharePoint External Collaborator Account Password

After successfully logging in, external collaborators must change their password and update their account information. If a password reset question and answer is not provided the Forgot password? link will not work.

To change your password and update your account information, click on the **drop down arrow** next to Welcome John_Doe@example.com in the upper right corner of the SharePoint window and select **Update My Account Information**.
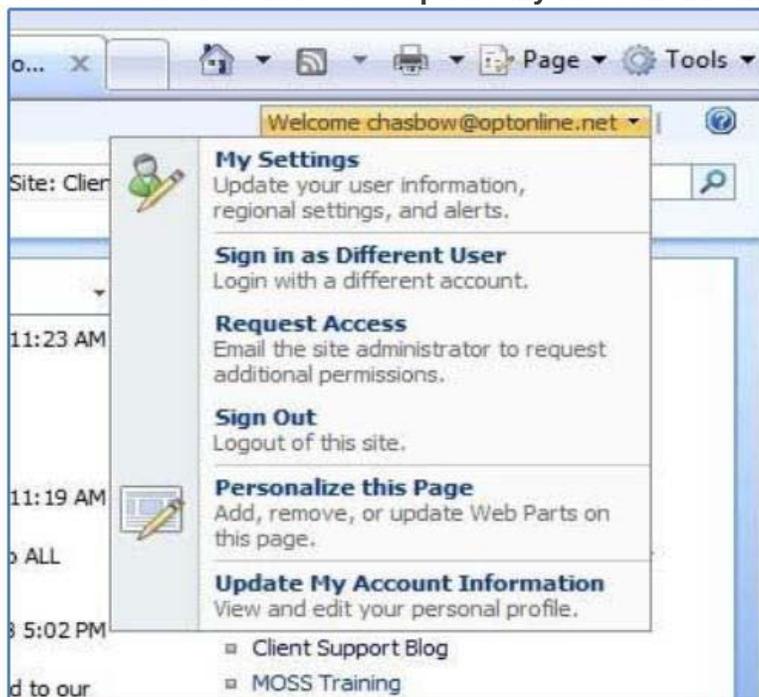
Complete all information on the Account Information screen:

Account Name: chasbow@optonline.net

First Name

Last Name

Company Name

Telephone Number

Current Password

☐ Change your password

New password

Confirm password

☐ Change your password reset question and answer

Password Reset Question [change the secret questic

Password Reset Answer

Update Account

1. Current password is the one that you just used to log in.
2. Select Change your password.
3. Enter your New password (twice).
4. Select Change your password reset question and answer.
5. Enter a Password Reset Question .
6. Enter a Password Reset Answer .

This is very important! This is the only way you may obtain a new password when you click the Forgot password?
link on the SharePoint Log in page. A new password will be e-mailed to you at the e-mail address provided.

Getting Started Using SharePoint

Sign In to Your SharePoint Site

1. Open Internet Explorer. SharePoint works <u>best</u> with Internet Explorer.
2. Go to your site:

Site URL	Example
student.stonybrook.edu/ your_club-name	student.stonybrook.edu/recycle_club
courses.stonybrook.edu/ course-name	courses.stonybrook.edu/egl645
teams.stonybrook.edu/ team-name	teams.stonybrook.edu/tltworkgroup
mysite.stonybrook.edu/	mysite.stonybrook.edu/sites/NetID

- ° Your username is: sunysb.edu\NetID
  (Don't for get to use the slash above the
- ° Enter key) Your password is your NetID
  password

Adding Users to Your Site

You will need to add users to your site as Visitors if they are the select few who can view your site, add users as <u>Members</u> if you want to give some users access to contribute and add users as <u>Owners</u>to give them full rights to the site.

1. Click on **Site Actions** > **Site Settings** > *Users and Permissions*: **People and groups**
- OR click on People and Groups from your Quick Launch on the left (if the Quick Launch is available)

- Click on **New** > **Add Users**.

  - Click here if you do not see Add Users in the New menu

- This is the Add Users: site_name form

Add Users: recycleclub

Use this page to give new permissions.

Add Users

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

Add all authenticated users

Users/Groups:

Give Permission

Choose the permissions you want these users to have. You can add users to a SharePoint group (which is already assigned to a permission level), or you can add users individually and assign them to a specific permission level.

SharePoint groups are recommended as they allow for ease of permission management across multiple sites.

Give Permission

◉ Add users to a SharePoint group

recycleclub Members [Contribute] ▾

View permissions this group has on sites, lists, and items...

○ Give users permission directly

☐ Full Control - Has full control.

☐ Approve - Can edit and approve pages, list items, and documents.

☐ Contribute - Can view, add, update, and delete.

☐ Read - Can view only.

☐ View Only - Members of this group can view pages, list items, and documents. If the document has a server-side file handler available, they can only view the document using the server-side file handler.

Send E-Mail

Use this option to send e-mail to your new users. You can personalize the message that is sent.

Links and information about the site will be added below your personal message.

☑ Send welcome e-mail to the new users

Subject:

Welcome to the SharePoint group: recycleclub Members for site: Port

Personal Message:

[OK]   [Cancel]

- Add Users :

Add users names by clicking on the open book icon (it is best to look people up by their NetID). Specific instructions are provided at the top of the window after you click the open book icon:

Add Users

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

Add all authenticated users

Users/Groups:

You can also allow all students, faculty, and staff to access your site by clicking on Add all authenticated users.

- Give Permission

This step will allow you to add these users to a group of common permissions or designate that they have unique permissions.

- Add users to a SharePoint group
    - Site_name Visitors (read-only access)
    - Site_name Members
    - (contributing access) Site_name Owners (full access)
- *It is a better practice to Add users to a SharePoint group rather than to Give users permission directly. It is easier to keep track of and control permissions especially when you have a lot of users.

- Send E-Mail

Uncheck the box if you don't want to send an email out to these users.

- Note: The e-mail will be sent to the users EPO. This is an easy to remember e-mail alias that forwards messages to Lotus Notes or Sparky (your campus e-mail in SOLAR).
More information can be found at: **stonybrook.edu/it** > **E-mail** > **Electronic Post Office** (EPO)
- Hit **OK**.

Note

on Site_name Members: A valuable component to being a Member is that the site will show up on your
Memberships List on your MySite Profile. It acts as a quick link!

Hint: For easier navigation, consider making yourself a Member to all the sites you own.
Once added as a Member to a site, leave about 24 hours for it to show on your
Memberships list.

On your MySite:
mysite.stonybrook.edu

Anonymous Access

Anonymous Access allows for public, read-only access to your site. No NetID is
required to view your site with anonymous access settings enabled. Consider this
option instead of adding many "Visitors" to your site or
document library.

1. Click on **Site Actions** > **Site Settings** > *Users and Permissions*: **Advanced Permissions**.
2. On the *Permissions: Club_Name page*, click **Settings** > **Anonymous Access**.
3. You can give read-only access to

- Your Entire Web site
- Just your Lists and Libraries
- Nothing (This will turn off Anonymous Access)

- Hit **OK**.

How to Share and Collaborate on Documents Using a Document Library

You can share and collaborate on documents in a document library any time and online.
The document library can be the central depository for all project, course or club
documents. Everyone who has permission will be able to access the most updated files.
You can also obtain previous versions of a file, implement an e-mail alert for changes and
utilize the check-in/check-out feature to prevent duplicates or overwritten documents.

Add a Document Library to your site (if you don't have one)

1. Click on **Site Actions** > **Create**
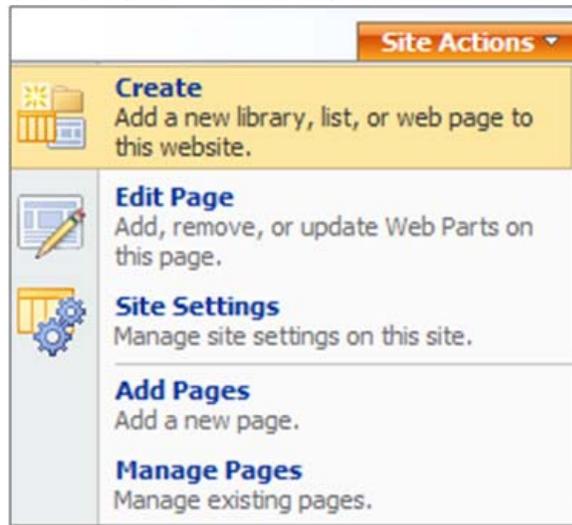
2. Choose **Libraries: Document Library**.
3. Give it a name Choose Yes if you want versioning for this Library. <u>Trus t me, you do</u>! This will allow you to obtain previous versions of files you store in your document libraries.
4. Choose a Document Template for all New Documents you initiate in this library. NOTE: On the Document Template list, choosing Microsoft Office Word, Excel, PowerPoint, will create by default new Microsoft Office 2007 documents
5. Hit **Create**.
6. *Note the URL to your Document Library: https://student.stonybrook.edu/ your_site_name / your_document_library_name

   **See the note in the section: "Upload a Document from an MS Office Application to Your Document Library". To use this feature, it is recommended that you create all document libraries as needed and delete all document libraries (if any) that come standard with the template you chose for your sites and subsites.

Upload Documents to a Your Document Library

1. Navigate to your document library by clicking on its name (on your main site) or typing in the URL.
2. Click **Upload** > **Upload Document** or **Upload Multiple Documents**.
3. Navigate and select the document(s) you want in this document library.

Upload a Document from an MS Office 2007 Application to Your Document Library

Note the URL of your Document Library when you click on its name on your main site. It should look something like:

https://student.stonybrook.edu/ site_name / document_library_name /Forms/AllItems.aspx

You can send a file immediately to your document library as long as you have an internet connection by typing in the Save As field everything to the left of /Forms/AllItems.aspx:

File name: https://student.stonybrook.edu/recycleclub/documents

<u>SPECIA L NOTE on ugly%20na mes: (Best Practice)</u>

If you initially chose a Site template that contains a document library its name as part of the URL will be Document%20Library even though you gave it a different name on your main site. You cant change that URL. What you can do is delete that library before your put any files in it and create a new one. The new ones name will match the URL. Also, use the underscore key instead of the space bar so your URL will look like this:
my_docs, instead of this: my%20docs.

Drag and Drop Files In and Out of Your Document Library in Explorer View

1. Look for the *View: menu* in the top left corner of your Document Library (just under the Site Actions tab).
2. Click the down-pointing arrow and select **Explorer View**.
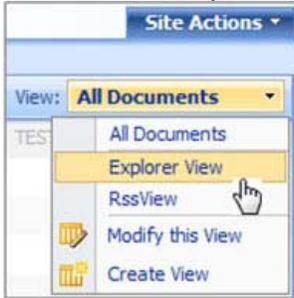
*Don't forget to change back to the All Documents view (the list view) in order to Check Out a document.
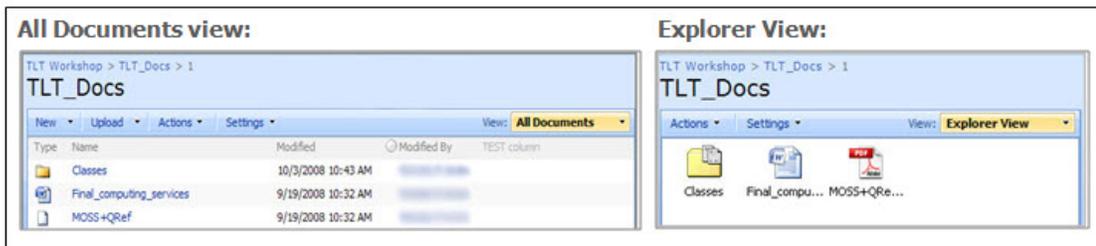

Allow Versioning on Your Document Library

Allowing versioning will let you access previous versions of files, should they be useful.
Youll create a new version every time you save or check in a file.

1. Open your Document Library by clicking on its name on your main site or by typing in the URL.
2. Click **Settings** > **Document Library Settings** > *General Settings*: **Versioning Settings**.
3. Lets, keep it simple, for now, by selecting Create major ve~~rsions and the~~n designate a limit on the retained versions.
   *Note the more versions you keep, the less storage space you'll have.
4. Select Yes so that it is a requirement that documents are checked out before they can be edited.
5. Hit **OK**.

Obtain Previous Versions of a File

1. Open your document library by clicking on its name on your main site or by typing in the URL
2. Mouse over the file in the Document Library and click the down-pointing arrow .

📁	stuff	9/1
📝	Final_computing_services	9/1
📄	MOSS+ORef	9/1
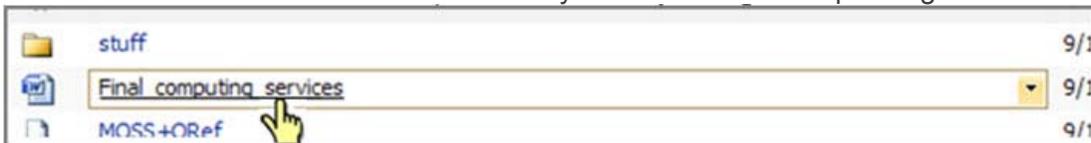
3. Then select Version History.

📝	Final_computing_servic ▼	
	View Properties	
📝	Edit Properties	
📇	Manage Permissions	
📝	Edit in Microsoft Office Word	
✕	Delete	
	Send To	▶
📋	Check Out	
📄	Publish a Major Version	
📑	Version History	
✓	Workflows	
	Alert Me	
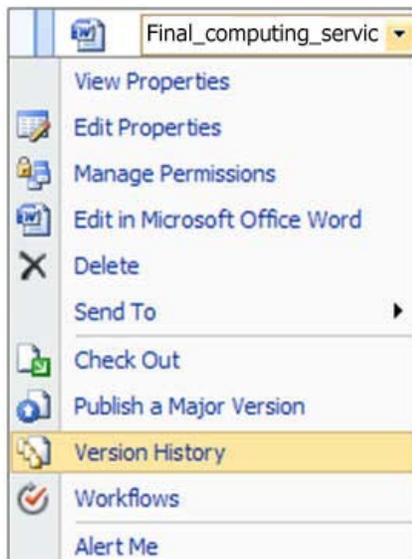
4. The highlighted one is the currently published one. To use a previous version, mouse over the one you want and click the down-pointing arrow and click **Restore**.

No. ↓	Modified	
3.0	6/23/2008 3:08 PM	
2.0	6/23/2008 3:06 PM	
1.0	6/23/2008 2:58 PM ▼	
		View
		Restore
		Delete
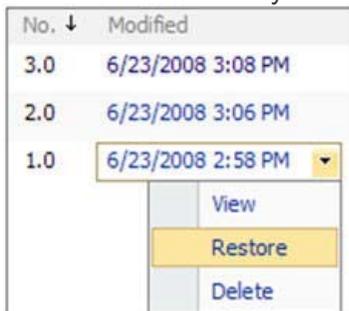
Collaborate and Share

Once you have files checked in to your document library you can alert others to take a look at a document by sending a link. This feature does not involve sending attachments. The best part about this feature is that you can revise the file even after you send the e-mail and everyone will always have the most updated file available to them.

If you use an e-mail client like Outlook:

1. Mouse over the file.
2. Click the down-pointing arrow, select **Send to** > **E-mail a Link**
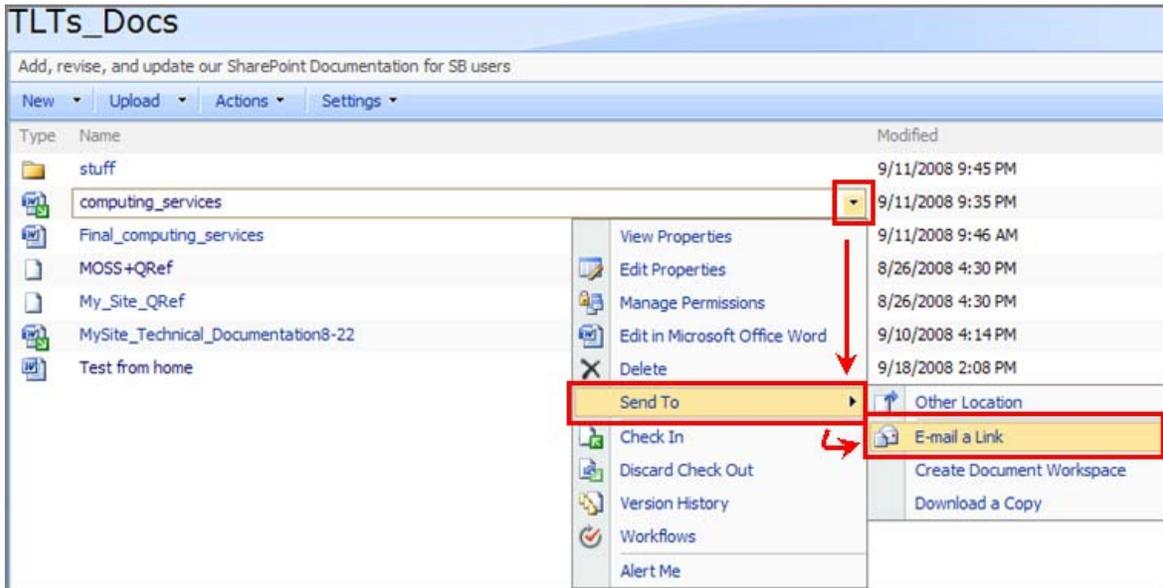
If you are using a browser-based e-mail (Gmail, Yahoo, etc):

1. Right-click on your file and click on **Copy Shortcut**.
2. In the body of your e-mail right-click and hit **Paste**.

Miscellaneous...

Set up Alerts for Any Changes to Your Document Library or SpecificFile
Alerts will send an e-mail to your EPO (your campus email address in Solar, which goes to your Sparky account for
Students or your Lotus Notes account for Faculty/Staff).

On an Entire Library: In your Document Library, click on **Actions** > **Alert Me** and fill out the New Alert form.
 On a Specific File: Mouse over the file and click the down-pointing arrow. Then select **Alert Me** and fill out the New Alert form.

Storage Space Allocation (How much room do I have left on SharePoint?)

Student SharePoint sites have 250MB, Team sites have 500MB and Course sites get 1GB. To keep track of the space used and the space remaining as well as how much space each library and document is using:

1. On the main site, click on **Site Actions** > **Site Settings** > *Site Collection Administration*: **Storage space allocation**.
2. Your total quota is noted on the status bar.
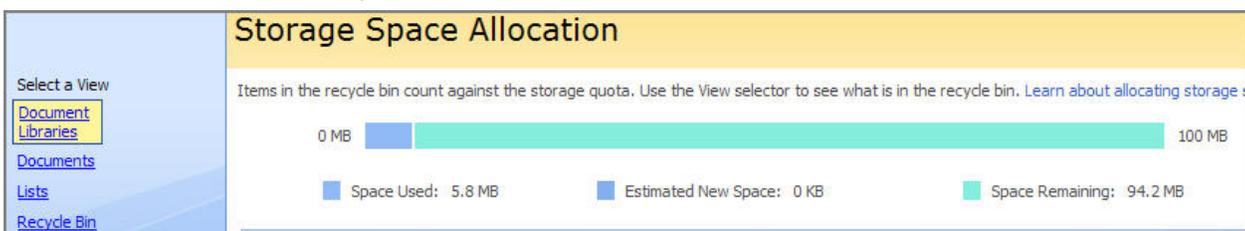
To check the space used on any Libraries, Documents, Lists, or Recycling Bins, click the links under Select a View on the left of your screen.

Add More Functionality to Your Site by Adding a Web Part

Add gadgets like calendars, a text box (Content Editor Web part), a search field and more by adding web parts. NOTE: Certain site templates come with certain web parts so choose your site template wisely.

1. Click **Site Actions** > **Edit Page**
2. Decide which Web Zone (left, center, right, etc.) you want your Web Part to appear.
3. Click on the yellow bar that says Add a Web Part .

4. Put a check next to the Web Parts you want to add.
5. Hit Add .
6. For more information on how to use specific Web Parts click on the Help and How-to button at the top left of your screen:
And type into the Search field the name of the Web Part.

Rearrange Your Web Parts on Your Site

You can move Web Parts to other Web Zones (Left, Center, and Right) or change the order in which they appear on a Web Zone.

1. Click on **Site Actions** > **Edit Page**.
2. Drag the title of a Web Part and drop it on your desired location.

Where is the <u>Add Users</u> menu item???

If you've run into this problem chances are the page you are working on is inheriting the permissions from the Parent
  Site. You must manually break this bond:

  STEP #1:   To un-inherit the parent's users permissions

  1. **Site Actions** > **Site Settings** > Users and Permissions: **Advanced Permissions**
  2. **Actions** > **Edit Permissions**

  STEP #2: Install the default SharePoint Groups

  1. **Site Actions** > **Site Settings** > Users and Permissions: **People and Groups**

  2. Click on **Groups** in the Quick Launch on the <u>left</u> of the screen

  3. **Settings** > **Set up Groups**

  4. Read the <u>Set Up Groups for this Site</u> form carefully! You will be given the option to create
      group names for <u>Visitors</u>, <u>Members</u>, and <u>Owners</u> of this site and the option to add users to
      each group. For each section make sure
        Create a Group is selected!

  HINTS

  Group Names:
  –Use a name letting you know what site the group belongs to!
  –Use underscores instead of spaces!

  Adding Users:
  –Add users using the book icon.
 See the **<u>Add Users</u>** above.
  –Add users using their NetID.

  5. Once you've given appropriate names to your groups and added users hit the **OK** button.

Logging Out of Your SharePoint Site

If you close your browser without logging out of your SharePoint site the session will remain open on the servers for up to 30 minutes . If someone opens the browser from the same computer they can access your site using your credentials. This is especially important if you are at a public terminal/computer.

To properly log out of SharePoint, click the drop down arrow next to your name in the upper right corner and choose Sign Out.

This is an example of how to do this from a site that is not upgraded to the new user interface:
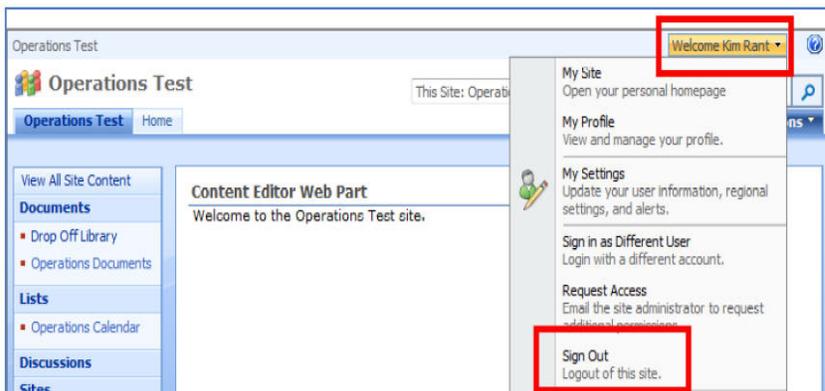
This is an example of how to do this from a site that is upgraded to the new user interface:
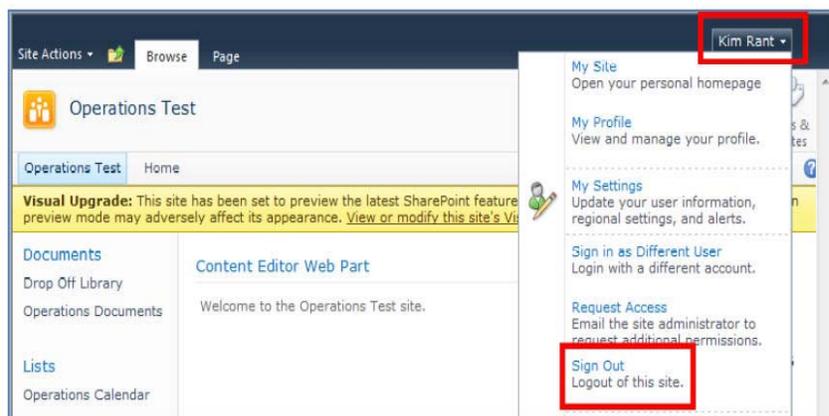
Logging in to a Stony Brook SharePoint Site as an External Collaborator

Site administrators may grant external collaborators (persons without a Stony Brook University NetID and NetID password) access to their Stony Brook SharePoint team site. The external collaborators email address is registered in SharePoint and a password is generated. The site owner must communicate the password and the site URL (https://teams.stonybrook.edu/your-site-name) to the external collaborator.

When visiting this URL, external collaborators will be presented with the SharePoint Login page.

External collaborators enter their email address and the password given to them by the Site Administrator. These passwords are generally very complex. It might be best to cut and paste this into the password field.

Adding Your SharePoint Site to Your Local Intranet Zone in Internet Explorer

By now you should know that in order to access a Stony Brook University SharePoint site, you need to sign in as follows:

User name: SUNYSB.EDU\NetID
Password: NetID Password

Where "NetID" is your NetID and "NetID Password" is your NetID Password.

 *** Make sure you are using a backslash (\ ) between SUNYSB.EDU and your NetID**



To avoid having to authenticate with your NetID more than once, follow these steps:

Step 1: Open Internet Explorer and go to **Tools > Internet Options**

Step 2: Click on the **Security tab**

Step 3: Select the **Local Intranet** zone icon and then click the **Sites button**.
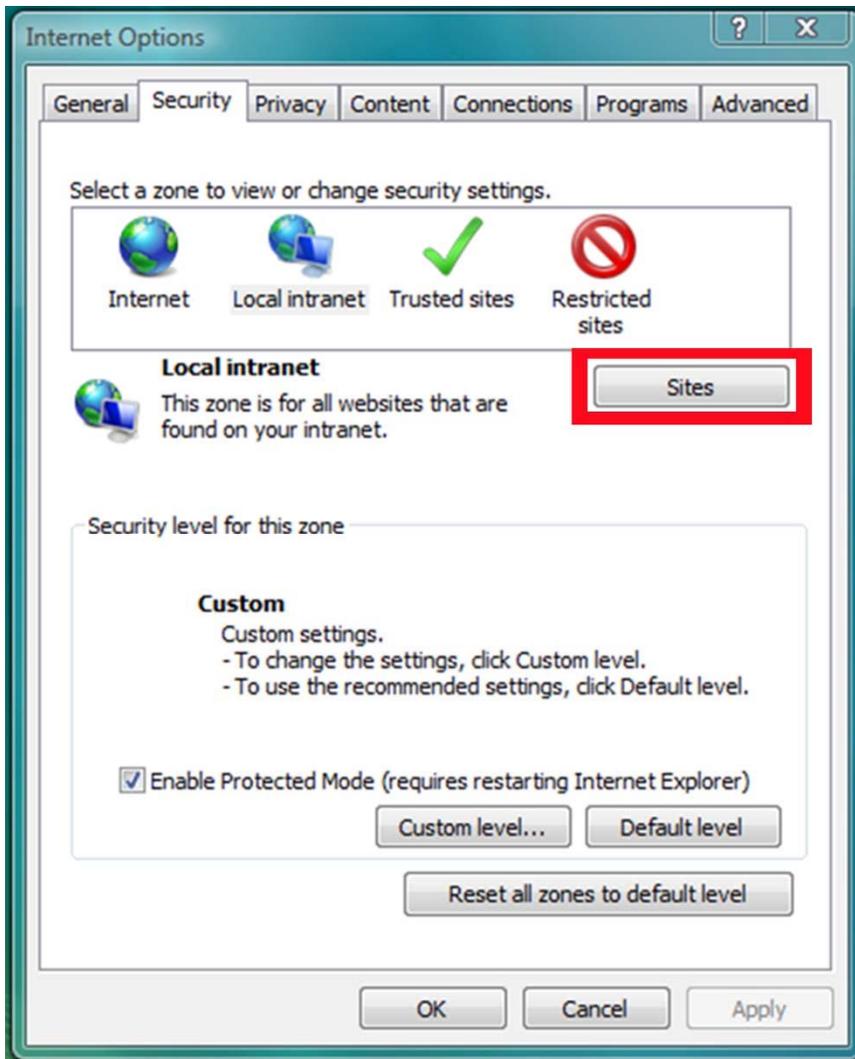
Step 4: Click the **Advanced** button when you come to this screen.
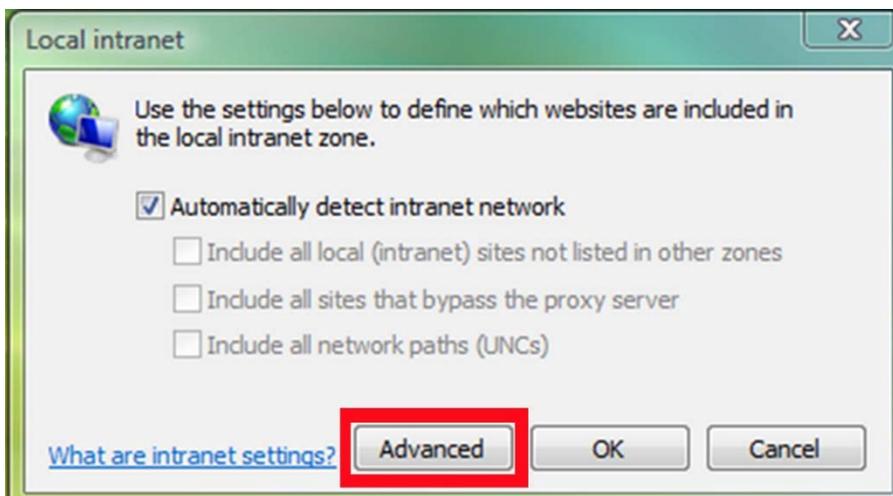
Step 5: Remove any Web address that may already be located in the "Add this website to the zone" field.

Step 6: Enter **https://mysite.stonybrook.edu** and click

Add. **Step 7:** Enter **https://teams.stonybrook.edu** and

click **Add**. **Step 8:** Enter **https://web.stonybrook.edu**

and click **Add**. **Step 9:** Enter

https://courses.stonybrook.edu and click **Add**. **Step**

10: Click **Close**.

Step 11: Click **OK**.

Step 12: Click **OK**.

How to Add Stonybrook Sharepoint sites into Trusted Intranet Zone in Firefox

Like in Internet Explorer, you can add sites into the Trusted Intranet Zone in Firefox. Adding these sites into this zone will have Firefox use your current login credentials (NETID and Password) and automatically log into Sharepoint.

To begin, open Firefox. At the address bar, type in about:config
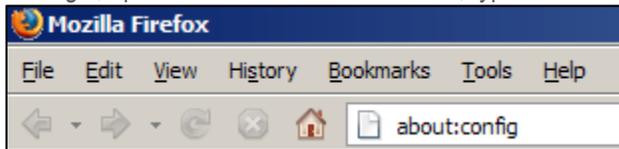
This will open up a HUGE list of configuration options. Scroll down to **network.automatic-ntlm-auth.trusted-uris**

Double-click on it to edit the settings for this string. Add in the following addresses:
mysite.stonybrook.edu,courses.stonybrook.edu,web.stonybrook.edu,teams.stonybrook.edu

MAKE SURE YOU HAVE NO SPACES IN YOUR ADDRESSES OR BETWEEN THE COMMAS
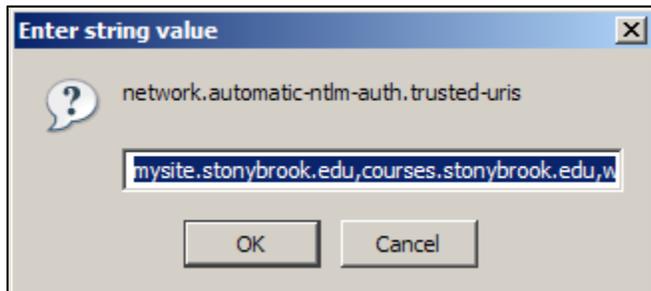
Press OK to save your changes. You should see the changes you made and the string should now be **BOLD**

Try to go to your Mysite or a Teams site and see if you are prompted for your credentials.

https://mysite.stonybrook.edu

Additionally, this information can be stored in a User.js file that can then be placed in the following directory:

1. On Windows XP/2000, the path is usually %AppData%\Mozilla\Firefox\Profiles\default.xxx\, where xxx is a random string of 3 characters. Just browse to C:\Documents and Settings\[User Name]\Application Data\Mozilla\Firefox\Profiles\ and the rest should be obvious.
2. On Windows 95/98/Me, the path is usually C:\WINDOWS\Application Data\Mozilla\Firefox\Profiles\default.xxx\
3. On Linux, the path is usually ~/.mozilla/firefox/default.xxx/
4. On MacOS X, the path is usually ~/Library/Application Support/Firefox/Profiles/default.xxx/

Please know that the location of the user.js file is dependent of your operating system and it's per user. Since it's a user specificfile, on a lot of systems it might not originally exist, so you'll have to create it.

The contents of the USER.JS file are pretty simple:

user_pref("network.automatic-ntlm-auth.trusted-uris",
"teams.stonybrook.edu,web.stonybrook.edu,mysite.stonybrook.edu,courses.stonybrook.edu");
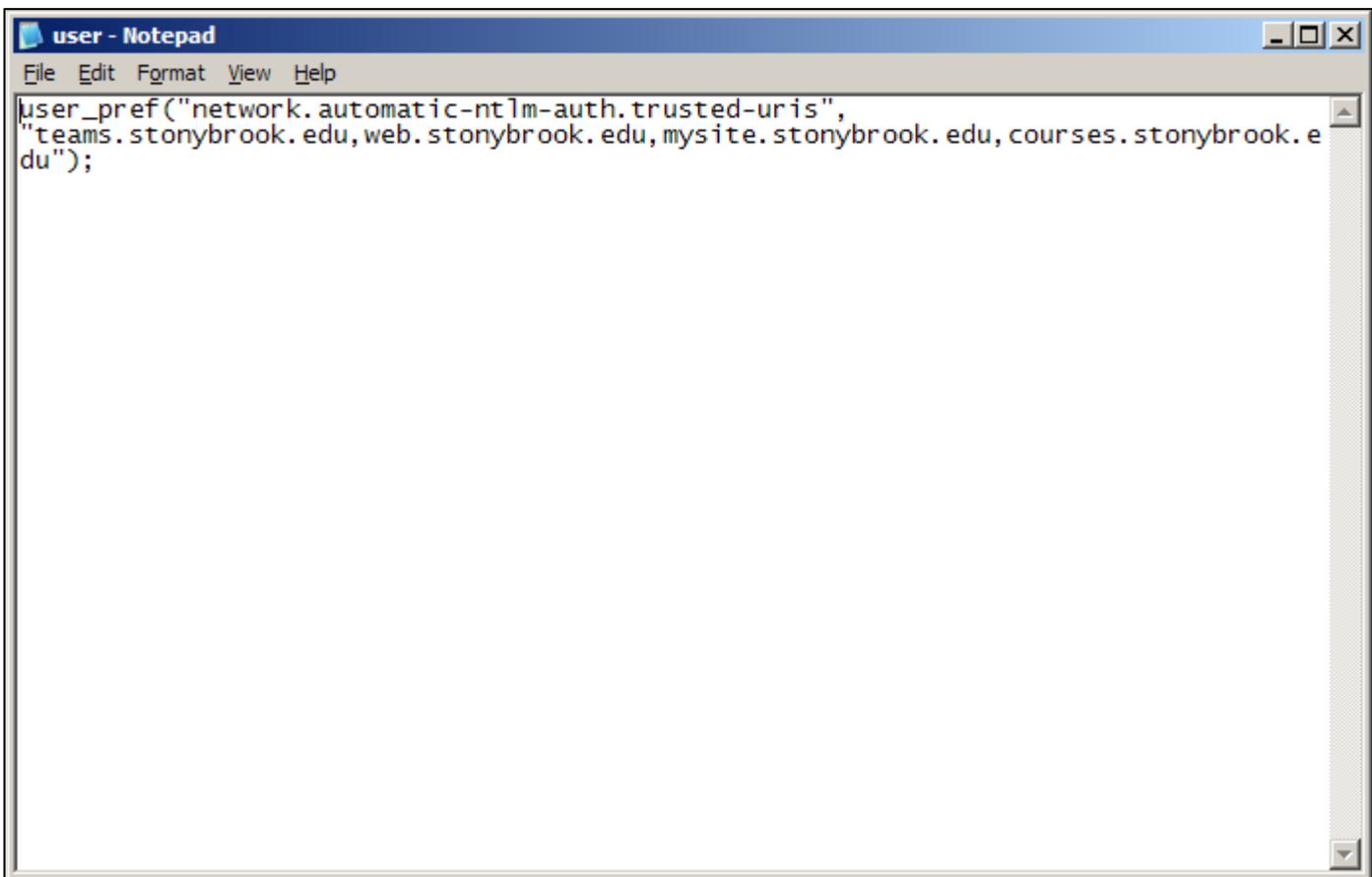

```
user_pref("network.automatic-ntlm-auth.trusted-uris",
"teams.stonybrook.edu,web.stonybrook.edu,mysite.stonybrook.edu,courses.stonybrook.e
du");
```

Save the file and then place it in the appropriate directory corresponding to the current user's account. The settings are applied when Firefox opens up.

Understanding SharePoint Web Browser Compatibility

The following browsers are fully supported to work with SharePoint:

- Internet Explorer 10
- Internet Explorer 9
- Internet Explorer 8
- Google Chrome (latest
- released version) Mozilla
  Firefox (latest releases
  version) Apple Safari (latest
  released version)

Please note that certain Web browsers could cause some SharePoint functionality to be downgraded, limited, or available only through alternative steps.

Learn more about known browser limitations in SharePoint:
http://technet.microsoft.com/en-us/library/cc263526.aspx