



Divisions of Family Practice

A GPSC initiative

Web Manual: SharePoint

August 2015

Table of Contents

Getting Started.....	4
What is SharePoint?.....	4
Request a SharePoint Site.....	4
Logging In	4
How to change your password	4
SharePoint Tools and Navigation	4
Using SharePoint through Explorer	5
Users and User Groups	6
Add a User	6
Remove a User	6
Add a User Group	6
Managing File Structure	8
Create a Folder	8
Customize Folder Permissions	8
Managing and Editing Documents	9
Versioning and Check-In / Check-Out Settings (Recommended!).....	9
Upload Documents	9
Open and Edit a Document.....	10
Share a Document.....	10
Set Up an Alert for When a Document is Changed.....	11
Delete Documents.....	11
Restore Documents from the Recycle Bin	11
Other Ways to Use SharePoint	12
Add an App	12
Edit an Existing App	12

Getting Started

What is SharePoint?

SharePoint is an online software platform that allows you to create team sites where you can share content and files securely. You can set up sub-sites for different projects and control who has access, even down to an individual page or file. SharePoint also has team calendars and the ability to create lists of records (useful for everything from a team contact list to tracking project tasks).

Request a SharePoint Site

Contact the [provincial Divisions office](#) to set up a site for the division and add an administrator.

Logging In

Go to: <https://remote.divisionsbc.ca/sites/{DIVISION}>

Enter your login information:

Domain\user name: divisions\{your email username}

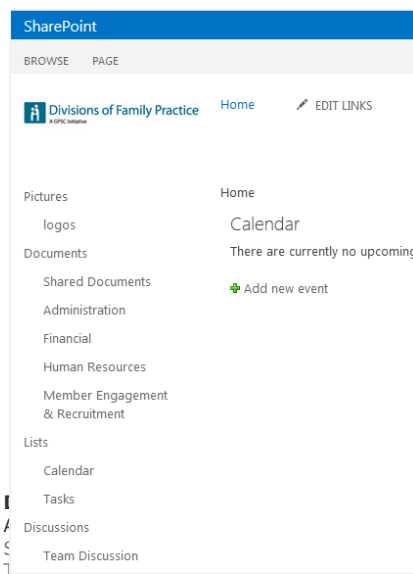
Password: {your email password}

How to change your password

While you can't change your password in the SharePoint site, you do have the following options:

1. If you have a divisions email address, you can sign in to the web app and change your password.
2. You can contact the support team at Robson Communications and request a password change: support@robsoninc.com

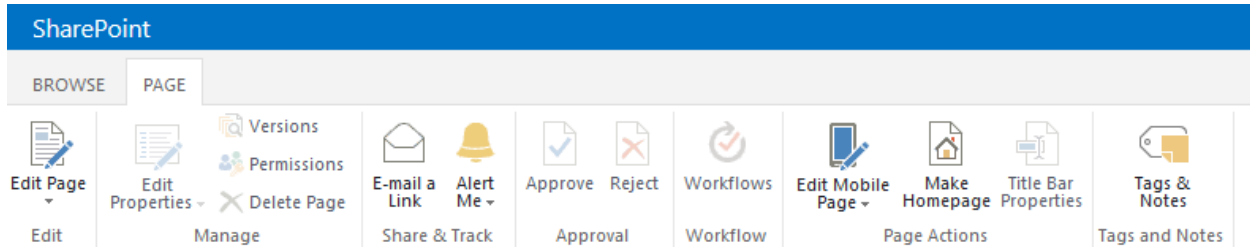
SharePoint Tools and Navigation



The QuickLaunch menu found in the left-hand sidebar allows you to navigate quickly to different parts of your site.

Click on the logo to go back to the main page.

To find the Office ribbon bar, click on the **Page** or **File** tab in the upper left-hand side of the page:



Using SharePoint through Explorer

This method allows you to create, open, modify, save files just as with Dropbox. Follow these steps:

1. In the document library, click the **Library** tab.
2. In the Connect & Export group in the ribbon, click the **Open with Explorer** icon.

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Users and User Groups

Add a User

1. If the person you want to add has an @divisionsbc.ca email address, you may add them to your site right away. If not, you must first send their information (first and last name) to the provincial divisions office staff to create a user account for them.
2. Go to your SharePoint site and log in.
3. Select the **Settings** icon (gear symbol) in the top right-hand corner of the screen.
4. Click on **Site Settings**.
5. Click on **People and Groups** under **Users and Permissions**.
6. Select the group you want to add users to. Make note of the permission levels. The default groups you have are:
 - a. Visitors: have read only rights.
 - b. Members: have contribute rights so they can edit things but not add new content.
 - c. Owners: have full access (read, write, edit). They can change anything in the site.
 - d. You can also create a custom group. See instructions below.
7. Once in the group, click on **New**.
8. Type the desired username(s) or emails and a personal message (optional).
9. Click on **Share**.

Remove a User

1. Go to your SharePoint site and log in.
2. Select the **Settings** icon (gear symbol) in the top right-hand corner of the screen.
3. Click on **Site Settings**.
4. Click on **People and Groups** under **Users and Permissions**.
5. Click on the user group the user is in and check off the box beside their name.
6. Select the **Actions** drop-down menu and select **Remove users from group**.

Add a User Group

1. Select the **Settings** icon (gear symbol) in the top right-hand corner of the screen.
2. Click on **Site Settings**.
3. Click on **People and Groups** under **Users and Permissions**.
4. Click on **Groups** in the left-hand menu.
5. Click on **New** then select **New Group**.
6. In the **Name** field, type out the group name.
7. By default the owner of the group is the person setting it up. There can only be one group owner. If you want someone else to be the group owner, enter their name in the **Group Owner** field.
8. Under **Give Group Permission to this Site**, select the level of permissions you want members of this group to have. You do not have to add any permissions at this time.
9. Click **Save**.
10. You will be taken to the **People and Groups** page to add users to the new group.

11. Click on **New** and add the names of the users, then click **Share**.

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August 2015**

Managing File Structure

Create a Folder

1. Click on **Shared Documents** in the left-hand menu. Navigate to the folder where you want to create a new folder.
2. Click on the **Files** tab in the upper left-hand corner of the screen. Then click on the **New Folder** button.
3. Enter the new folder name, then click **Ok**.

Customize Folder Permissions

1. Next to the folder name, click on the **ellipsis...**
2. In the pop-up window, click on the **ellipsis...** then select **Shared With**.
3. To view the folder's permissions page, click **Advanced**.
4. By default, the folder will inherit the permissions you've set up for the whole site. To remove permission inheritance for the folder, click **Stop Inheriting Permissions**.
5. For users and user groups already in the permissions list, check them off and either use the **Edit User Permissions** or **Remove User Permissions option**.
6. To add additional users or user groups, click on **Grant Permissions** and add the desired users.

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Managing and Editing Documents

Versioning and Check-In / Check-Out Settings (Recommended!)

To ensure only one person at a time is editing a document, you can turn on forced check-out of documents. You can also create automatic versions of documents as edits are made. You can always revert to a previous version if needed. To turn on these options:

1. Click on **Shared Documents** in the left-hand menu.
2. Click on the **Library** tab in the upper left-hand corner of the screen.
3. In the **Settings** section of the ribbon, select **Library Settings**.
4. Under **General Settings** select **Versioning Settings**.
5. In the **Document History** section:
 - a. Select **Create major versions**.
 - b. Check off **Keep the following number of major versions** and enter the number **5**:

Optionally limit the number of versions to retain:

Keep the following number of major versions:

5


6. In the **Require Check-out** section, select **Yes**.

Users will now be prompted to check out documents in order to edit them. The system will also save the last 5 copies of document.

Upload Documents

Method 1 – Drag and Drop


4. Click on **Shared Documents** in the left-hand menu. Navigate to the folder where you want to upload the document(s).
5. On your computer, locate and select the document(s) you want to upload.
6. Drag them over to the window where SharePoint is open and hover over the **drag files here** header:

 new document or drag files here

7. Drop the files there and they will be uploaded.

Method 2 – Upload Window

1. Click on **Shared Documents** in the left-hand menu. Navigate to the folder where you want to upload the document.
2. Open the files upload window:
 - a. Option 1: click on the **Files** tab in the upper left-hand corner of the screen. Then click on the **Upload Documents** button.
 - b. Option 2: click on the **+ new document** header:

 new document or drag files here

3. Click on the **Browse** button and locate the file you want to upload from your

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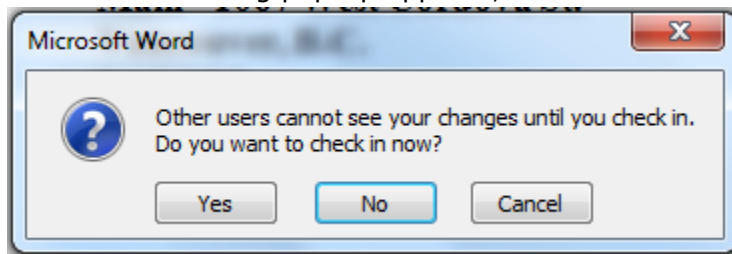
Web Manual: SharePoint
August 2015

- computer.
4. Click **Ok**.

Open and Edit a Document

Method 1 – With Forced Check Out

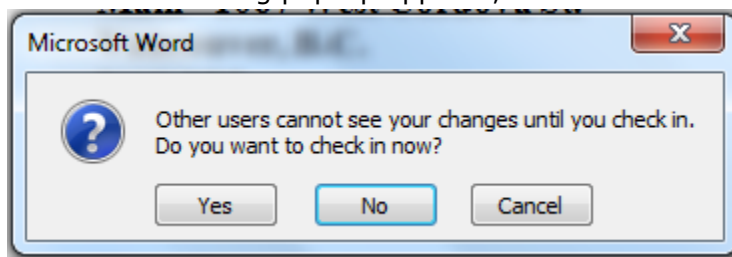
1. Select **Shared Documents** and navigate to the document you want to edit.
2. Click on the document title to open.
3. In the **Open Document** pop-up window, select **Check Out and Edit**, then click **Ok**.
4. Make your edits, then save and close.
5. When the following pop-up appears, select **Yes** to check in your edits:



6. Enter any version comments in the **Check-In** pop-up window.

Method 2 – With Optional Check Out

1. Select **Shared Documents** and navigate to the document you want to edit.
2. Next to the document, click on the **ellipsis...**
3. In the pop-up window, click on the **ellipsis...** then select **Check Out**.
4. Click on the document title to open.
5. Make your edits, then save and close.
6. When the following pop-up appears, select **Yes** to check in your edits:



7. Enter any version comments in the **Check-In** pop-up window.

Method 3 – Without Check Out

1. Select **Shared Documents** and navigate to the document you want to edit.
2. Click on the document title to open.
3. In the **Open Document** pop-up window, select **Edit**, then click **Ok**.
4. Make the desired edits, then save and close.

Share a Document

You can SharePoint's share feature to send a link to a document:

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Web Manual: SharePoint
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1. Select **Shared Documents** and navigate to the document you want to edit.
2. Check off the box next to the document you want to share.
3. Click on the **Files** tab in the upper left-hand corner of the screen.
4. In the **Share & Track** section, select **Share**.
5. Begin to type out the name of the person you want to share the document with and select their name when it appears in the drop-down menu.
6. Click **Share**.

Important: You can only add people with access to your SharePoint site.

Set Up an Alert for When a Document is Changed

1. Select **Shared Documents** and navigate to the document you want to edit.
2. Check off the box next to the document you want to share.
3. Click on the **Files** tab in the upper left-hand corner of the screen.
4. In the **Share & Track** section, select **Alert Me > Set alert on this document**.
5. Fill in your preferences and click **Ok**.

Delete Documents

Method 1 – Ribbon Bar

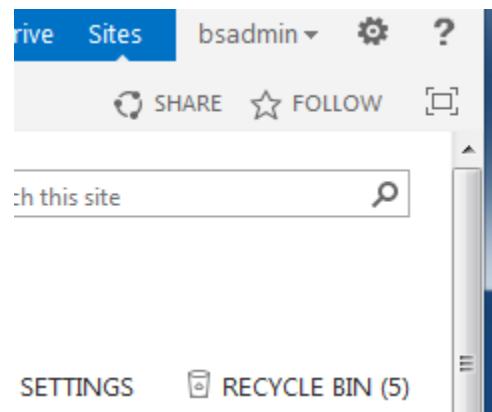
1. Locate the document(s) you want to delete and tick the checkbox beside the document(s).
2. Click on the **Files** tab in the upper left-hand corner of the screen. Then click on the **Delete Document** button and click **Ok**.

Method 2 – Ellipsis... Menu

1. Next to the folder name, click on the **ellipsis...**
2. In the pop-up window, click on the **ellipsis...** then select **Delete** and click **Ok**.

Restore Documents from the Recycle Bin

1. Click on the gear symbol in the upper right-hand corner of the screen and select **Site Contents**.
2. Click on **Recycle Bin**.
3. Check off the files you want to restore, then click on **Restore Selection**.



Other Ways to Use SharePoint

The SharePoint apps provide many uses beyond document sharing:

- Form Library: Holds business forms. This library requires a compatible editor such as InfoPath.
- Wiki Page Library: Stores wiki pages.
- Picture Library: Stores pictures.
- Links: Contains HTML links.
- Announcements: Creates and sends announcements.
- Contacts: Stores contacts.
- Calendar: Creates a calendar.
- Promoted Links: Creates a place to store links to specific actions using a visual tile-based layout.
- Discussion Board: Enables users to discuss topics in a threaded forum.
- Tasks: Stores tasks.
- Issue Tracking: Tracks issues.
- Custom List: Creates a blank app based on a list.
- Custom List in Datasheet View: Provides a datasheet view (similar to the Custom List template).
- External List: Connects to external data.
- Survey: Conducts surveys.
- Import Spreadsheet: Imports a spreadsheet and its data.¹

Add an App

1. Select the **Settings icon** (gear symbol) in the top right-hand corner of the screen.
2. Click on **Site Settings**.
3. Click on **Add an App** and select the app you want from the list.

Edit an Existing App

1. Select the **Settings icon** (gear symbol) in the top right-hand corner of the screen.
2. Click on **Site Contents**.
3. Select the app you wish to edit.

¹ Source: <http://www.dummies.com/how-to/content/common-apps-in-sharepoint-2013.html>

Learning Tools & Support

Resources from Microsoft:

- [Get started with SharePoint 2013](#)
- [SharePoint Online training course, videos and tutorials](#)
- [How to:](#)
 - a. Create a group
 - b. Add users to a group
 - c. Remove users from a group
 - d. Grant site access to a group
 - e. Delete a group
 - f. Assign a new permission level to a group
 - g. Add, change, or remove a site collection administrator
- [How to change permissions on a folder](#)
- [How to customize user access to list items, and library files](#)

Resources from SharePoint for Dummies:

- [SharePoint 2013 apps](#)