Document Management Using SharePoint On-line

Training Materials for the Research Office

August 2018

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1 What is SharePoint On-line?

SharePoint Online is a cloud-based solution that facilitates sharing and collaboration. It is available as part of the University's Microsoft agreement (this can be found at https://help.uis.cam.ac.uk/service/user-accounts-security/accounts-passwords/microsoft-accountsand provides a platform for document management which in the first instance will be used to replace the current "Outlook Public Folders" capability.

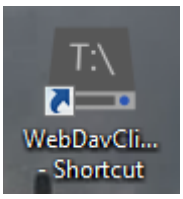
2 Initial Set Up

In order to ensure that e-mail items can be dragged to and from the SharePoint site without the need to save to a temporary folder, it will first be necessary to map the network drive. **This only needs to be done once** and an automated mechanism has been provided to allow you to do this.

If you do, however lose connection to your mapped drive, for example if your PC is replaced or reset, simply repeat these steps.

Steps

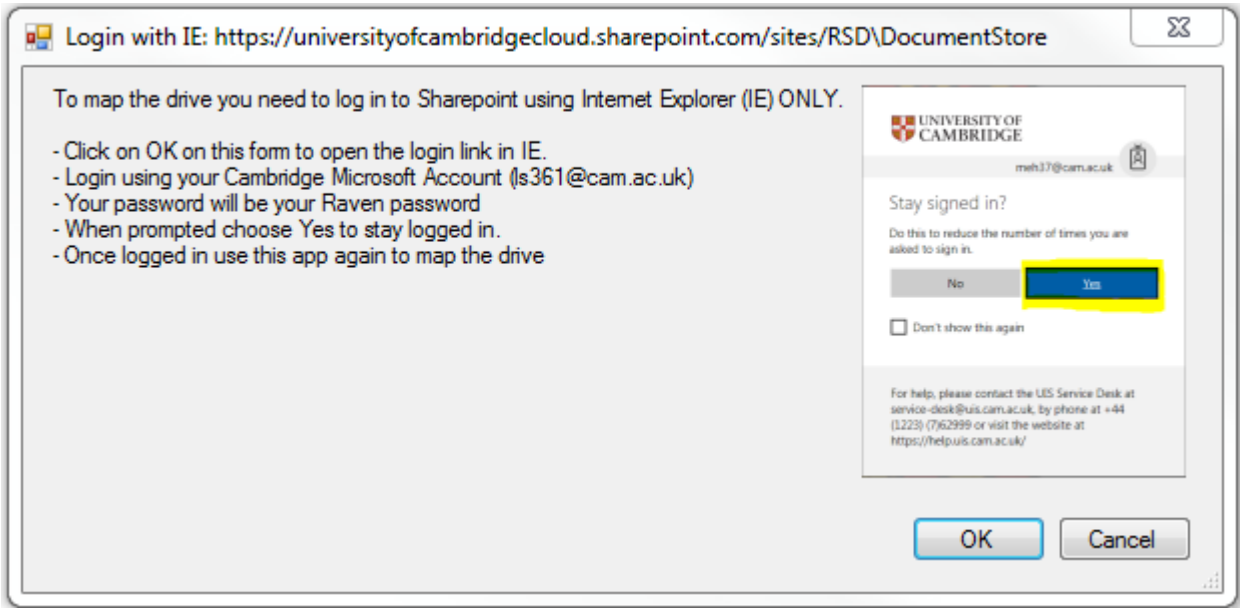
On your desktop double click the icon shown. This should have been placed on your desktop automatically. If you cannot see it please contact the service desk (servicedesk@uis.cam.ac.uk or (01223 3) 32999)



Note: If the shortcut is not shown, the location is:

J:\Applications\DotNet\Drive Mapping\Map T Drive (ROO).lnk

The following dialogue box will open:



Click OK

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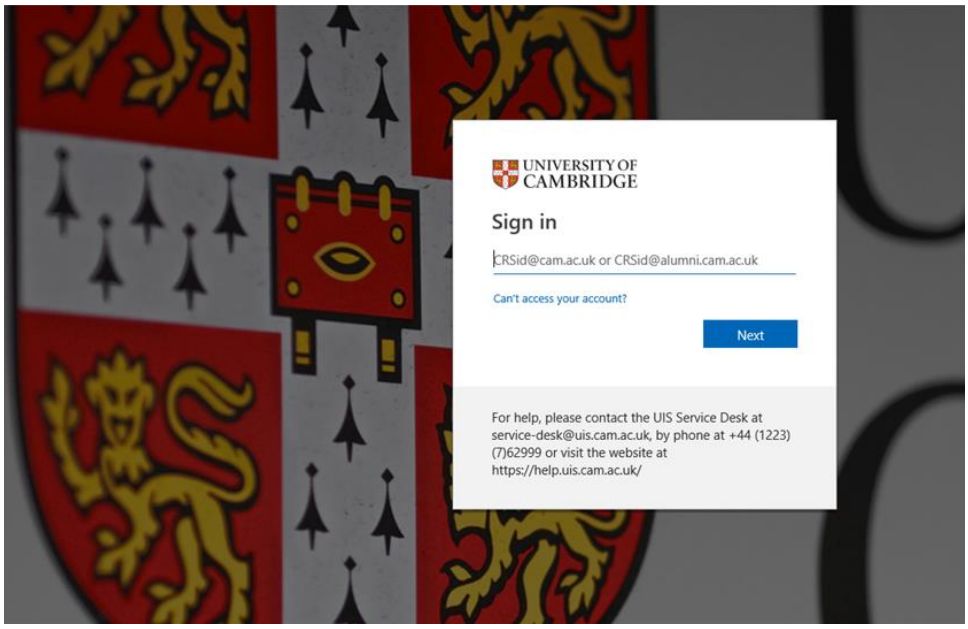
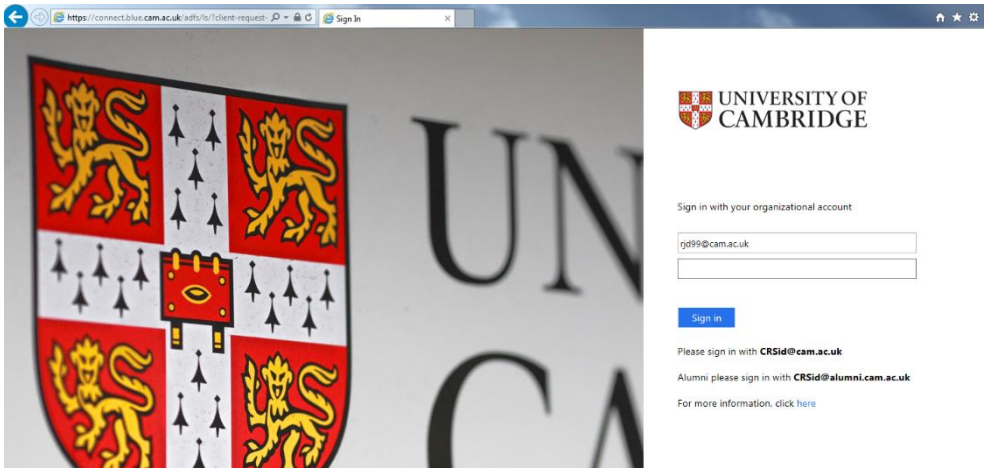
You will then see this message. **Do Not** click OK until you have completed the steps to log into Internet Explorer (below).

You will be asked to enter your log in credentials, do this by clicking on your crsid@cam.ac.uk account.



You will see a message saying that you will be taken to your organisation's sign in page.

Sign in using your UIS credentials (Raven password)



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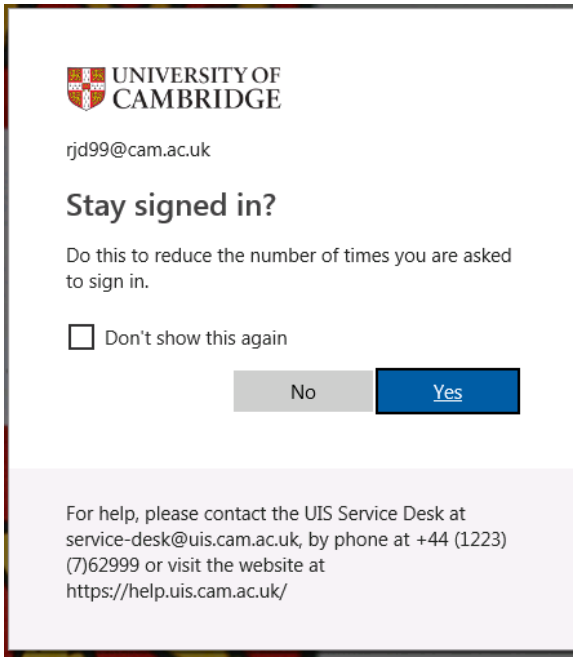
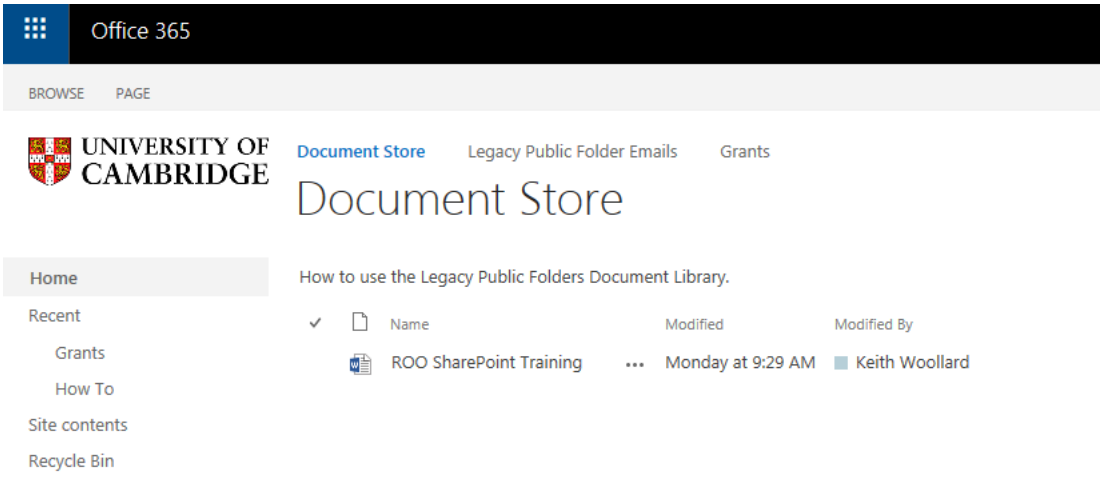
Once signed in you see the following:

Click Yes.



An Internet Explorer session will open as shown below.



You can now click OK on the prompt below (seen previously):

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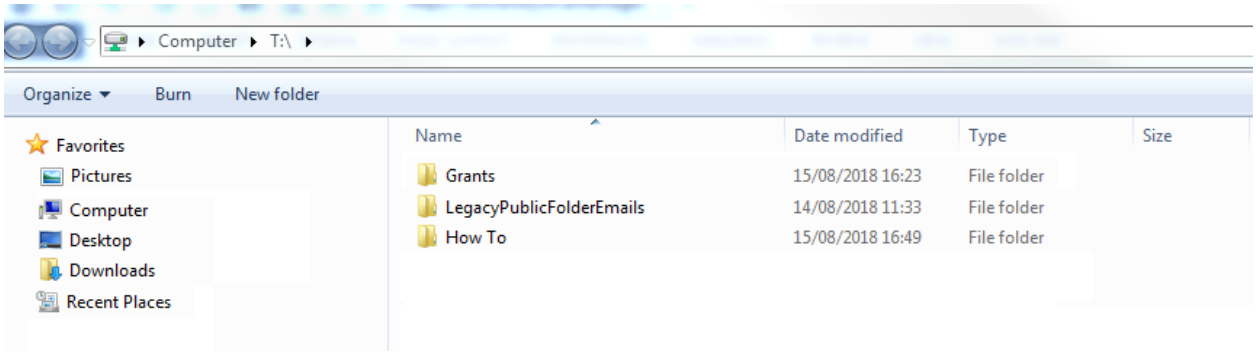
A Windows Explorer session will then open displaying the newly mapped drive, with your folders present.
It will look something like the diagram below:



Note – Internet Explorer must be used to carry out this task

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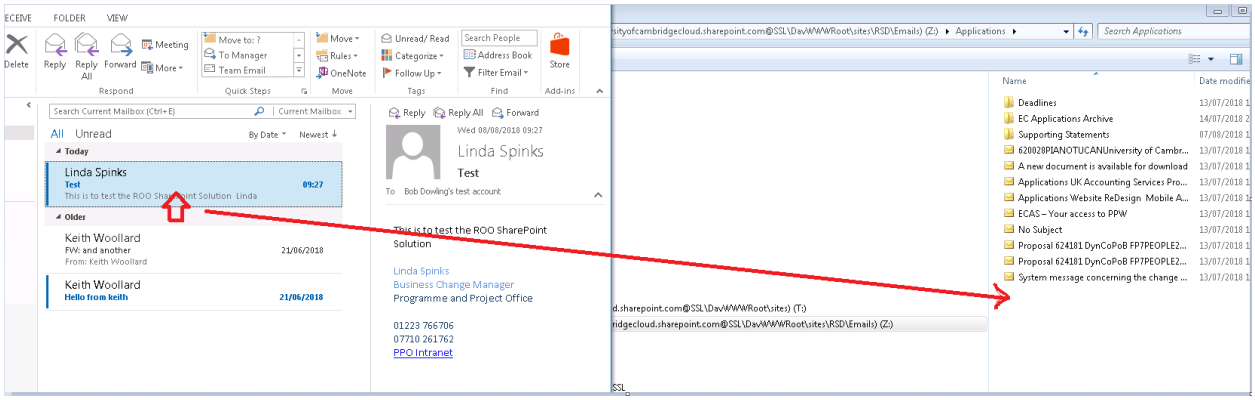
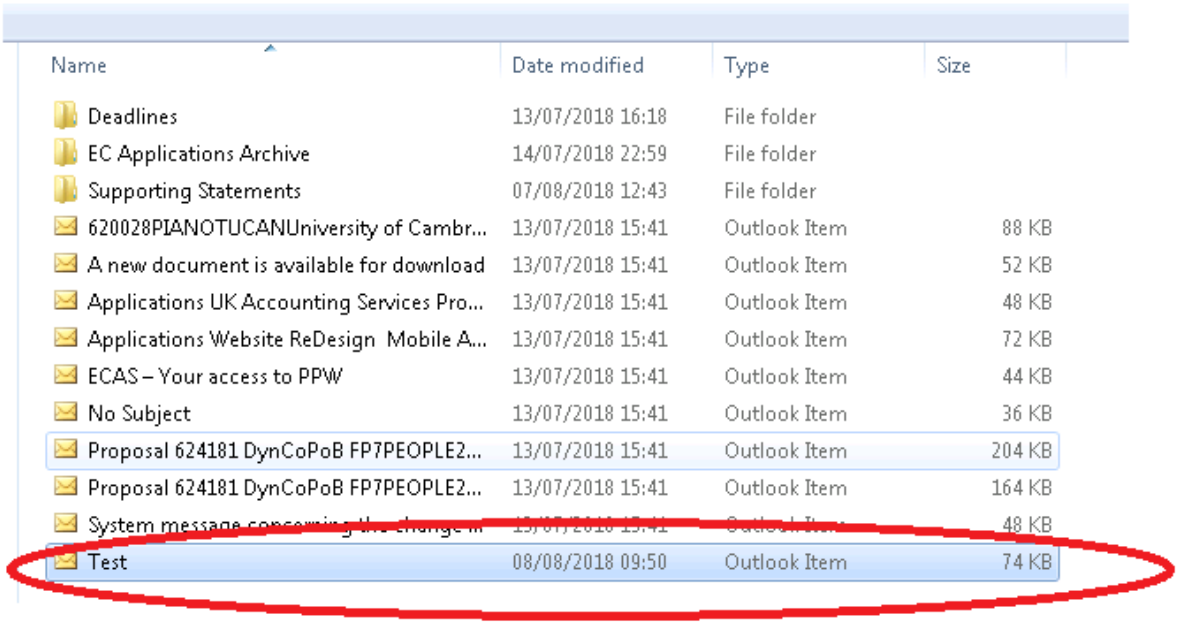
3 Moving E-mail Items to SharePoint Mapped Drive

E-mails can be dragged from your inbox to the SharePoint mapped drive in Windows Explorer.



Once done the e-mail file will be seen in the Windows Explorer view of the SharePoint file as well is via the SharePoint browser view.

Windows Explorer View



SharePoint View

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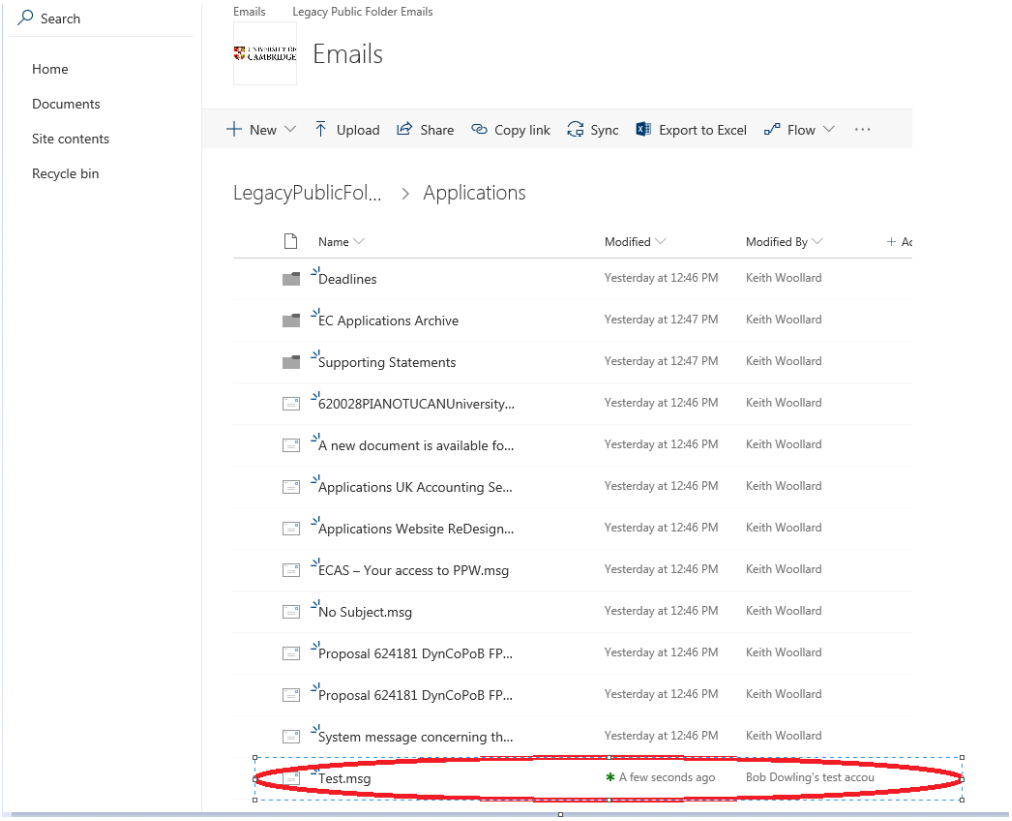
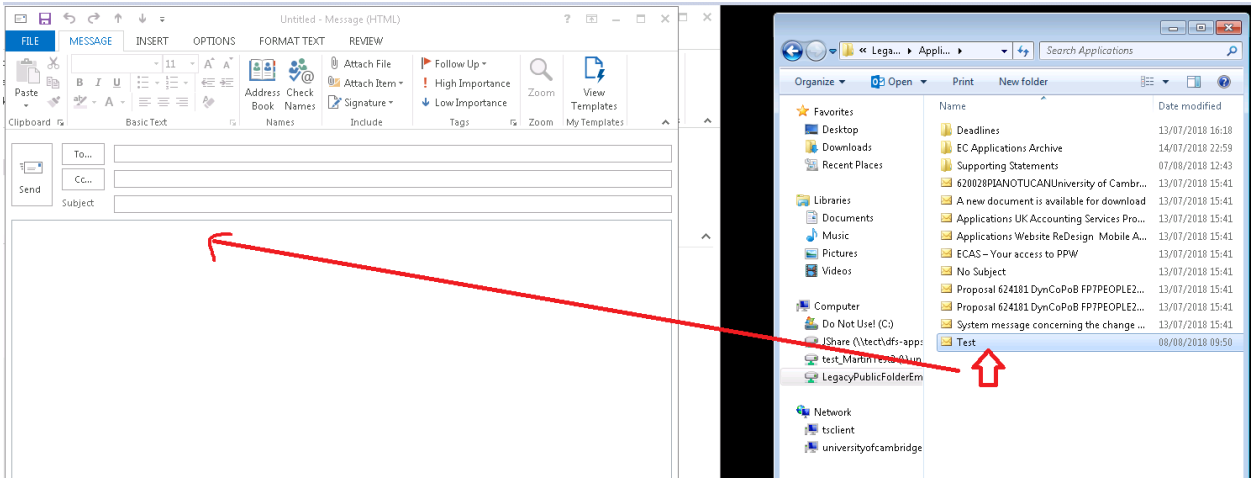


4 Attaching Items from SharePoint Mapped Drive to E-mails

If you need to attach items to an e-mail from the SharePoint mapped drive, again you can simply drag the items from Windows Explorer to the body of your e-mail.



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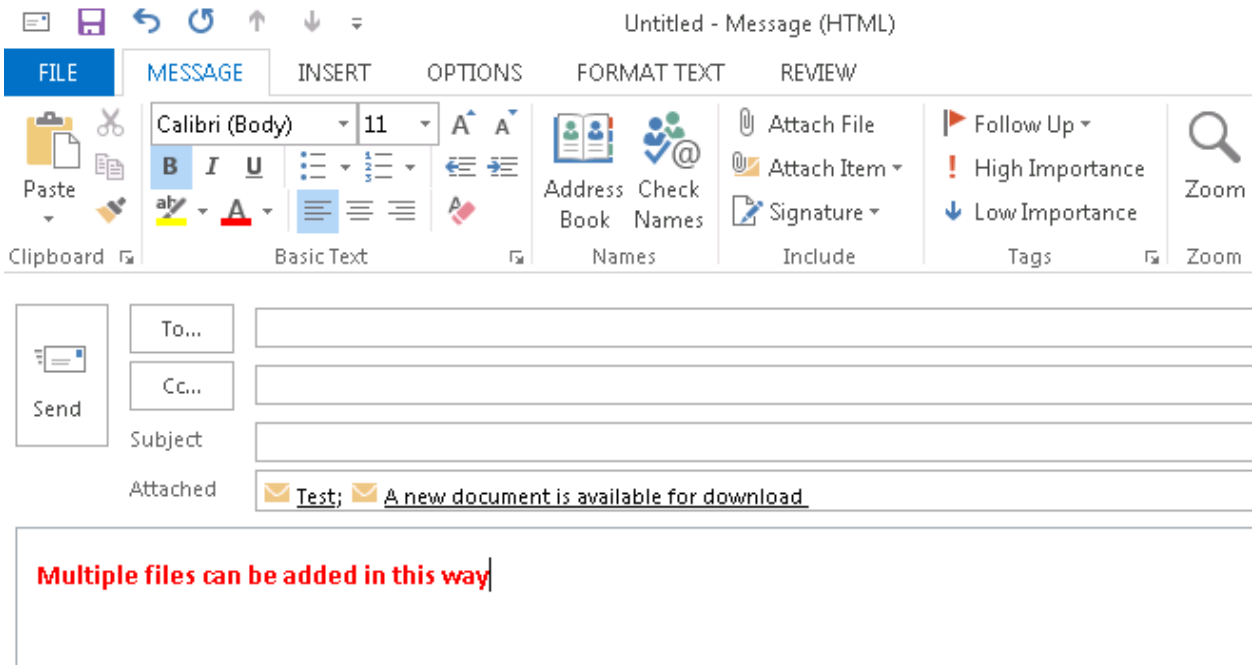

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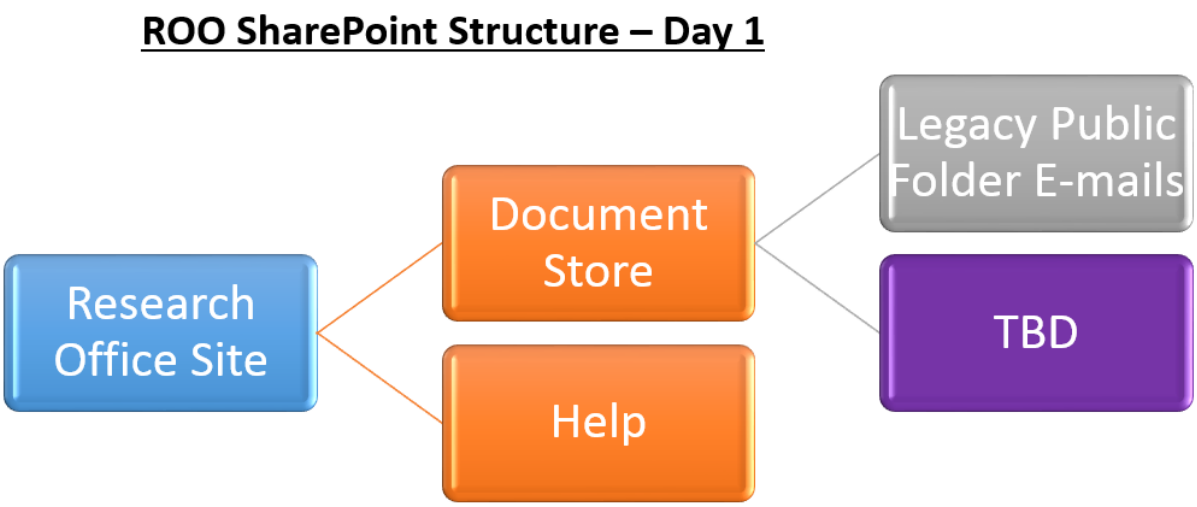
5 Using the SharePoint View

5.1 Overview of SharePoint for ROO

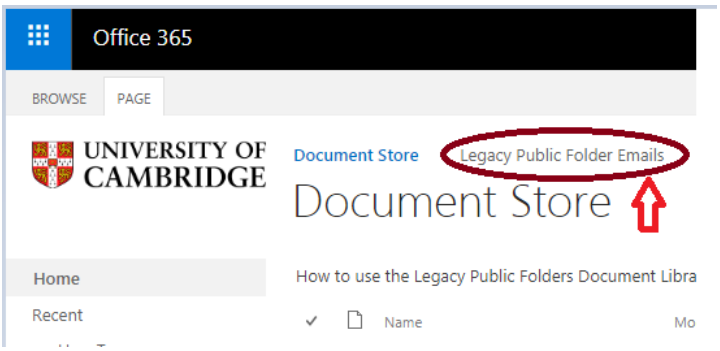
The SharePoint site will be set up as per the diagram below:



In the future, users with the appropriate permissions will be able to add folders to the Document Store as necessary (see below).

You can access your Research Office Document Store via the following link using any browser:
https://universityofcambridgecloud.sharepoint.com/sites/RSD/DocumentStore

To access the “Legacy Public Folder Emails” content you should then click on the link shown:



The Research Office Institution SharePoint site can be accessed via the following link via any browser:

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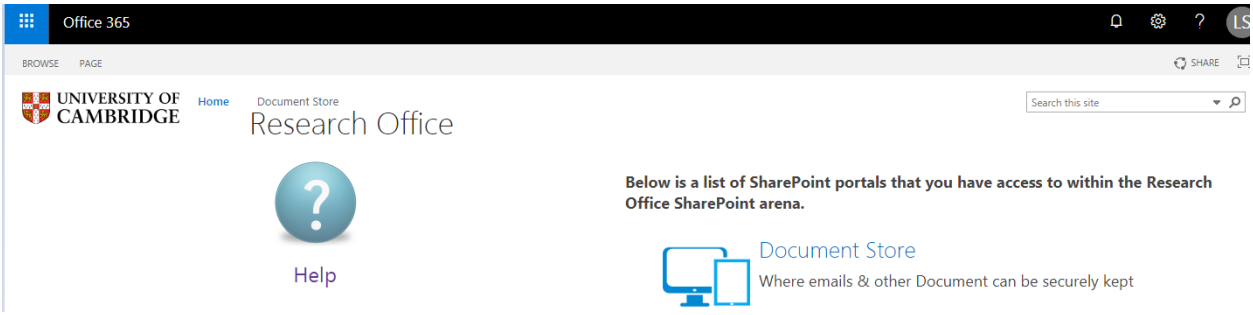
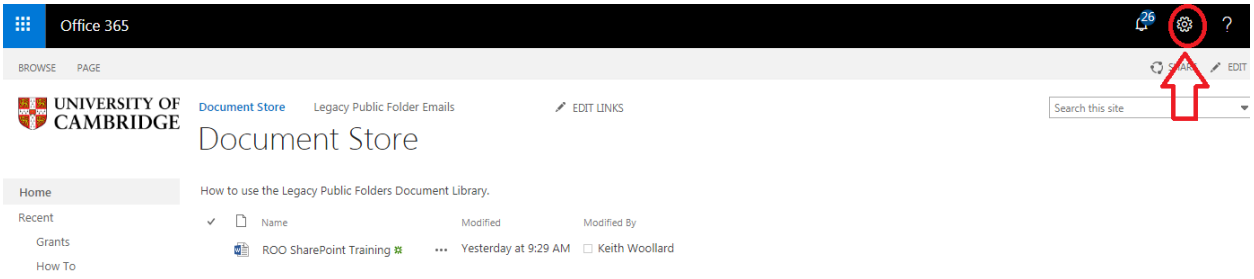
https://universityofcambridgecloud.sharepoint.com/sites/RSD



Via this page you can access the Help area of the site as well as the Document Store.

5.2 Create a New Document Store (Super-users Only)

The initial set up of your new site contains one main folder within the overarching document store. This folder is caller “Legacy Public Folder E-mails” and can be accessed as shown above. If you wish to create a new document store within this structure (and you have the correct permissions) you need to follow the steps outlined below:



Click on the Cog Icon as shown above.

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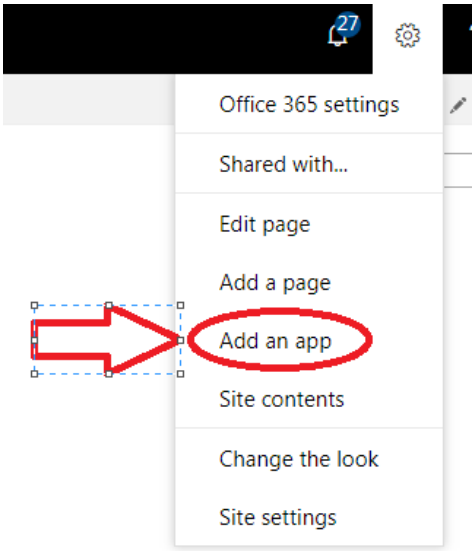
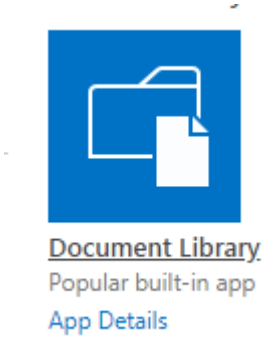
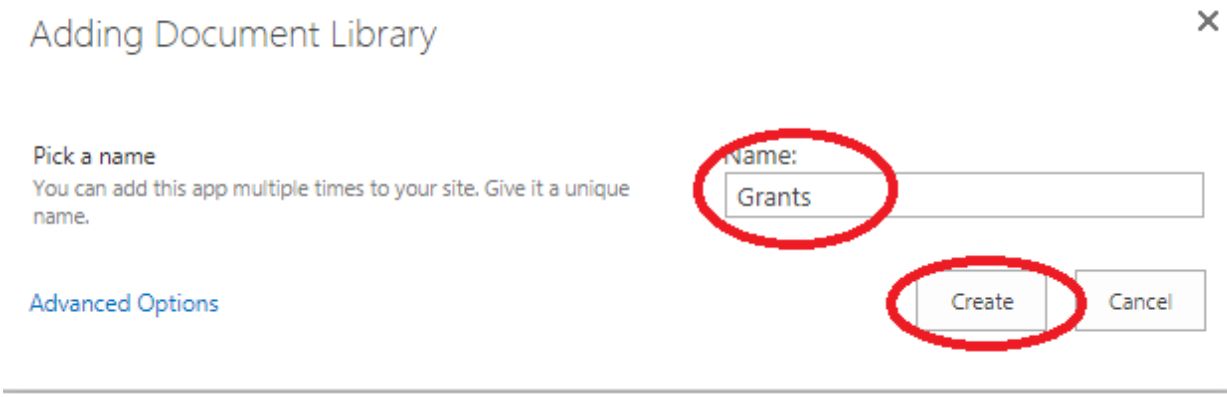
Select the “Add an app”  Option



Choose the Document Library Icon from the available list



Enter the Name of your library – I have chosen the name “Grants” and click “Create”.

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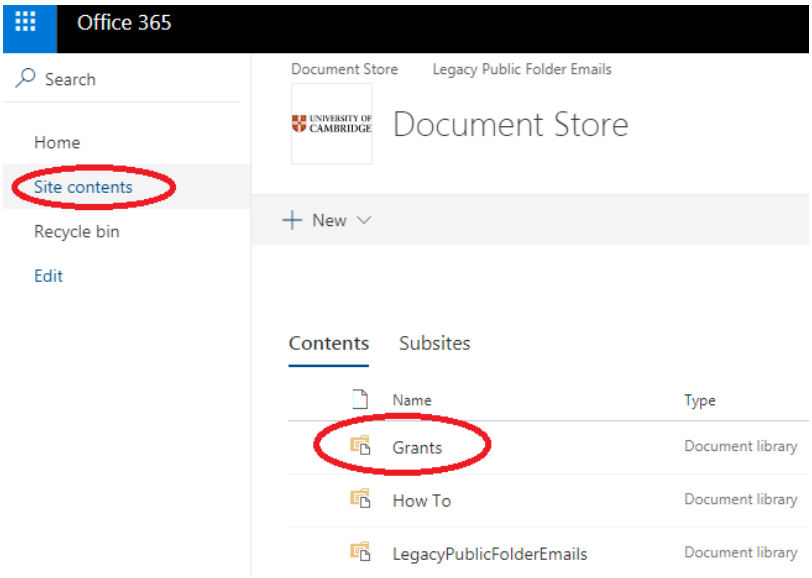
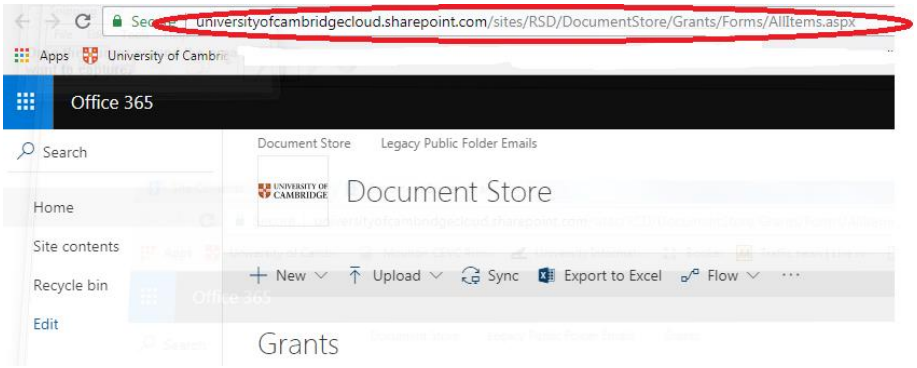
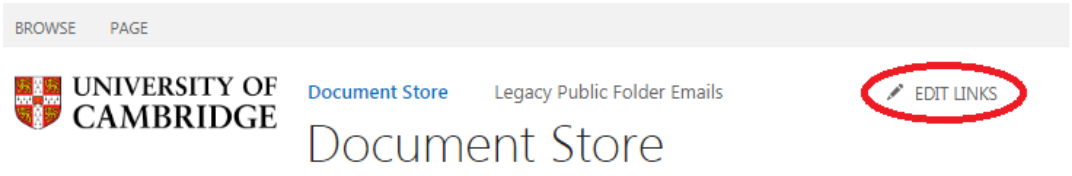


Your new “Grants” library will appear in your Site Contents page

In order to set up the quick link along the top of your page, carry out the following steps:



Select the Grants option from the site contents page (shown above) and copy the resulting URL



Select the Edit Links Icon on the top of the toolbar and select the +Link (

)

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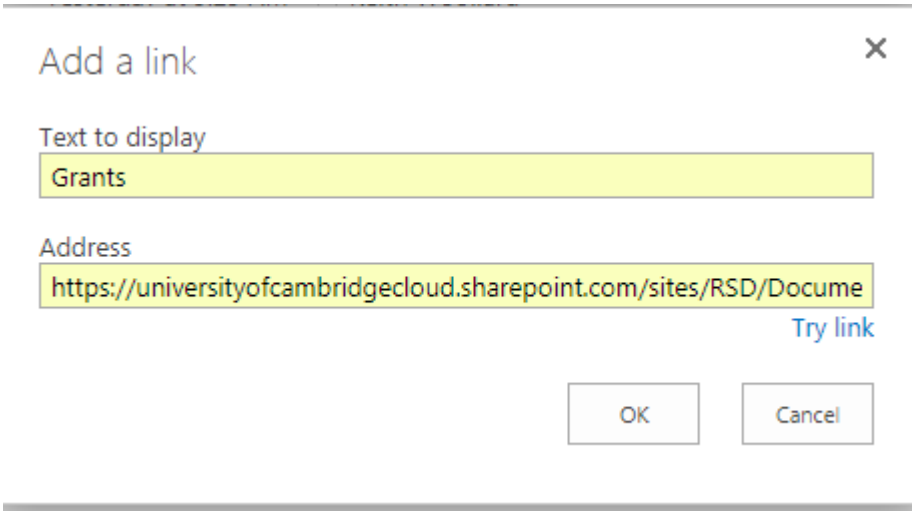
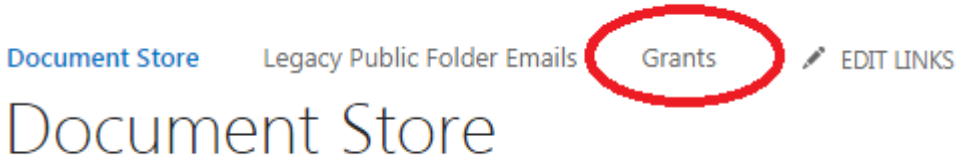
Add the Display text in the first field, then past the link into the address field.



Click OK



Your new Grants link can now be seen at the top of the page.

To delete a document store – follow the instructions which can be found here.

5.3 Create a New Folder

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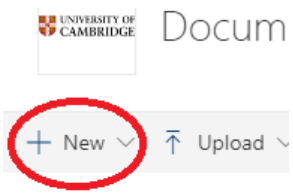
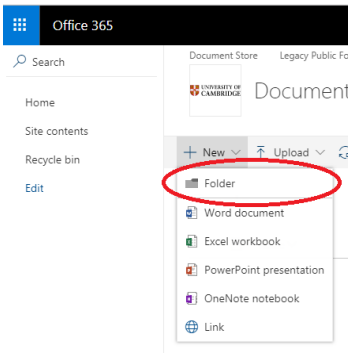
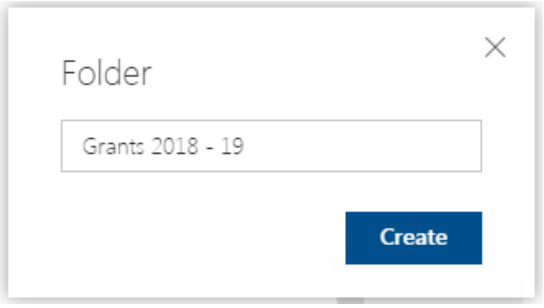
To create a new sub-folder within your new document store, select the “New” option:



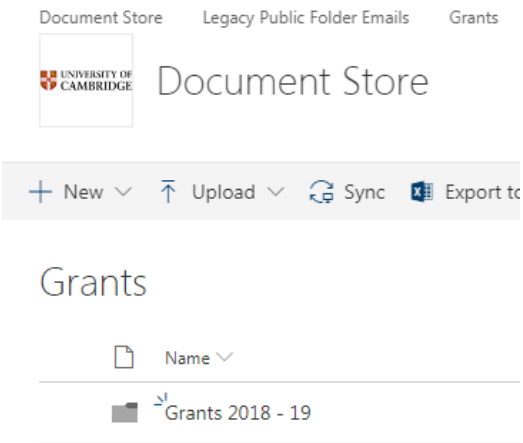
Then choose the “Folder” options:



Enter your new folder name and click “Create”:



Your new folder will be displayed under the Grants heading:



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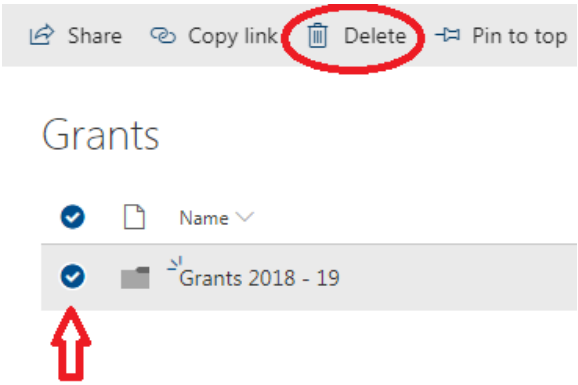
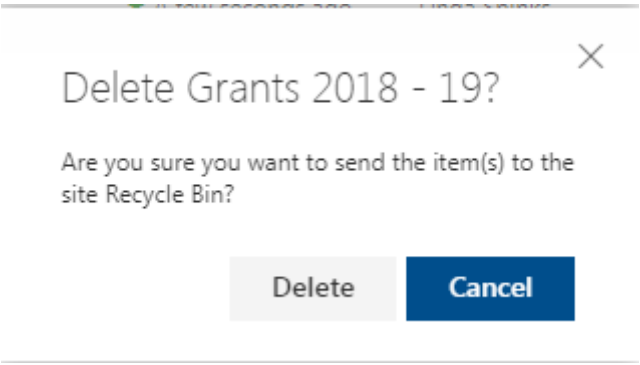
To delete a folder, select the folder and click the Delete button:



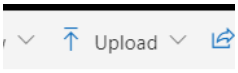
A dialogue box will ask whether you want to Delete or Cancel – select "Delete" if you no longer need the folder.



5.4 Uploading Files/Folders from Your Computer

You can upload files or folders from your computer directly to the SharePoint interface in two ways:

1 - By using the Upload button



2 – By dragging the file(s) or Folder(s) from Windows Explorer into the area shown below:

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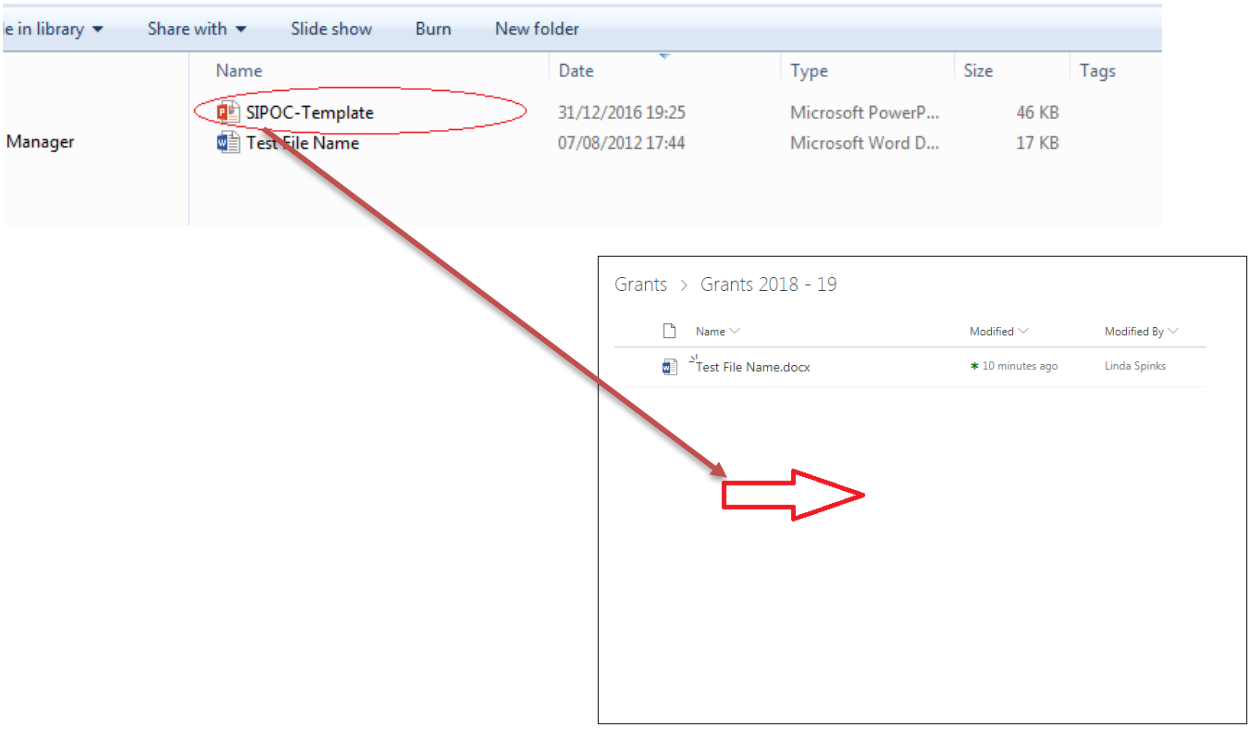
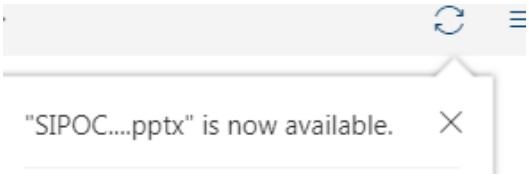
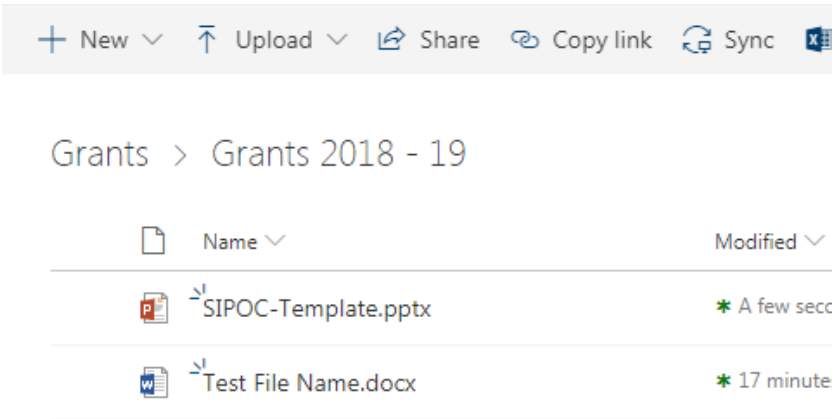


A message will be displayed briefly at the top right of the screen, then a message “file is available” will be shown.



Your newly uploaded file or folder will be shown



5.5 Create a New Document

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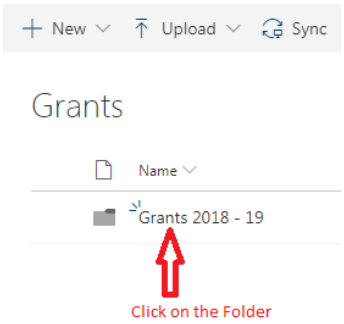
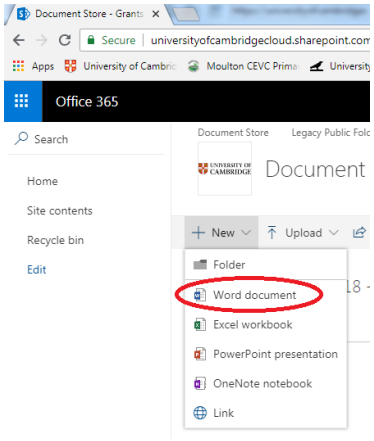
In a similar way you can create new documents or link to other locations using the +New button. Document types are:

- Word
- Excel
- PowerPoint
- OneNote notebook

To add a new Word document to your folder, open the folder by selecting it:



Select the Word Document option:



A new Word document will be created in Word Online. You can work on this document in the On-line environment or select “Edit in Word” to download to your computer.

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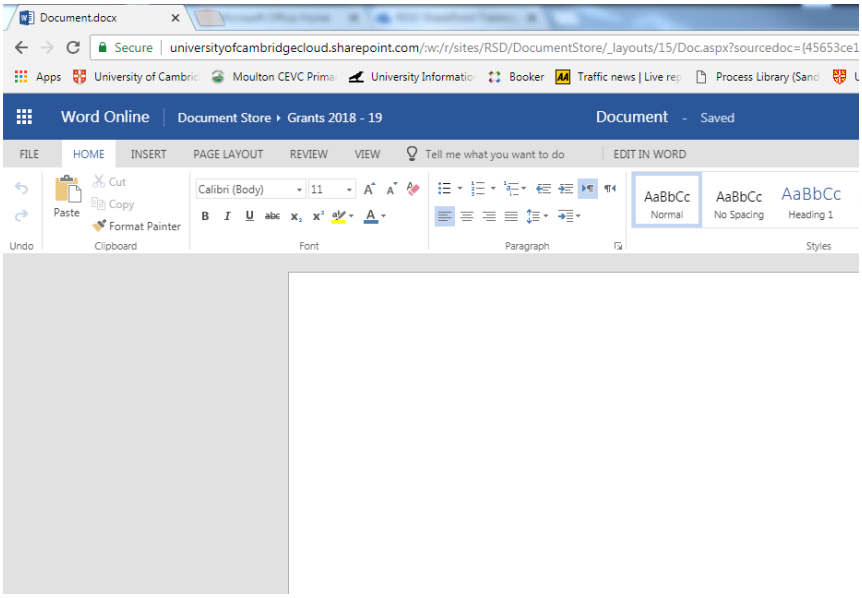
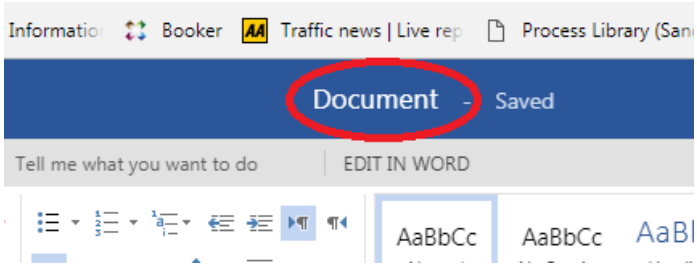
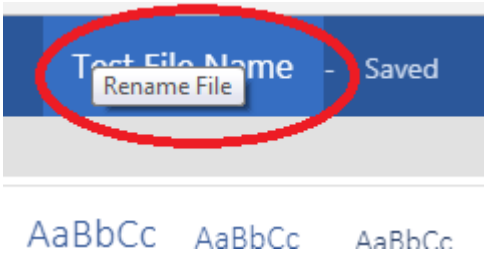


To create a Title for the document click on the “Document” at the top of the page and type your document name. The document will then be saved as that name.





When working in Word Online your document will be automatically saved.
When working in Word on your computer you will need to save your document periodically. If connected to the internet (via Wi-Fi or cable) your document will be saved to SharePoint.

For further information on creating new documents or links please see the online help section here.

6 Sharing Files

There a multiple ways to share files or folders, with variations depending on whether the users you want to share with have migrated to Exchange Online or not.
The steps below can be followed but further information can be found here

6.1 Restrict Access to Folder

In order to limit access to a particular folder the following steps must be taken:

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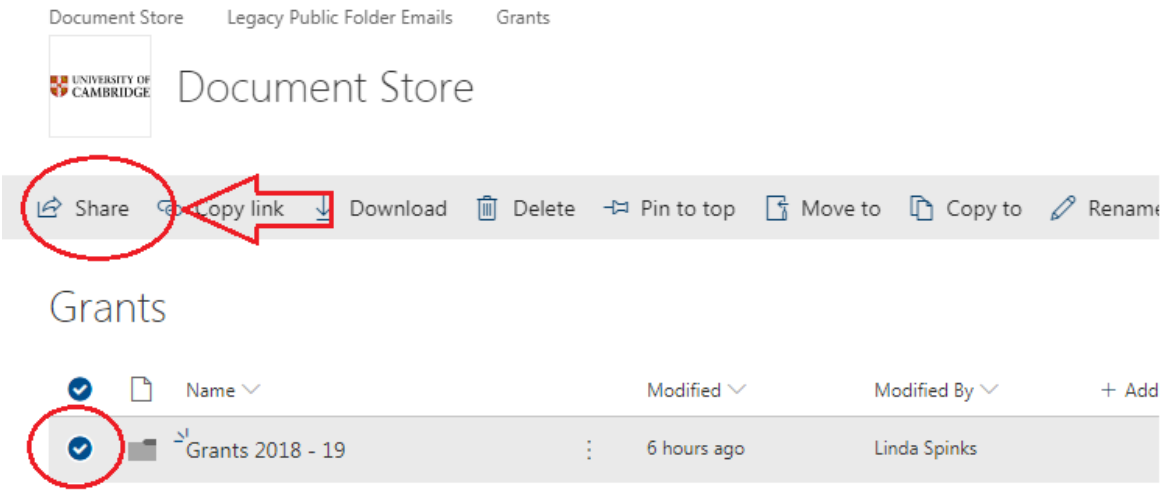
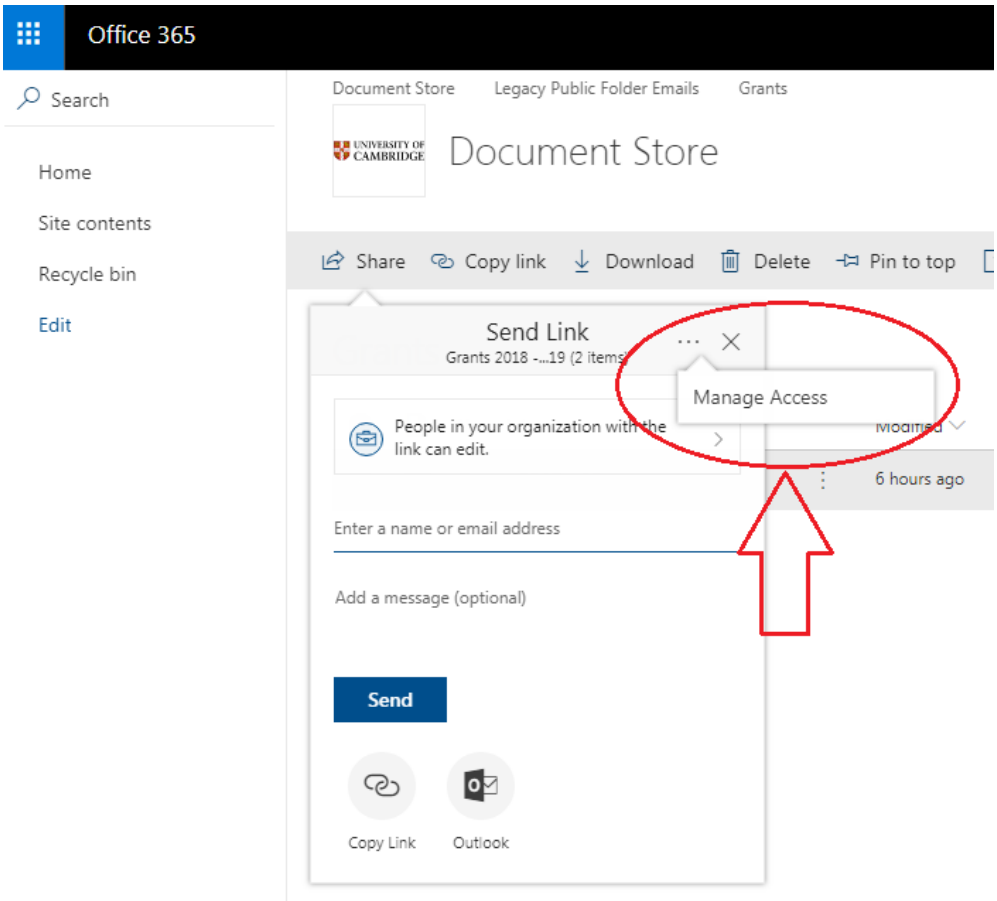


Select the folder or document that you want to restrict and click on the “Share” option



In the dialogue box, click on the “…” option, and select “Manage Access”.

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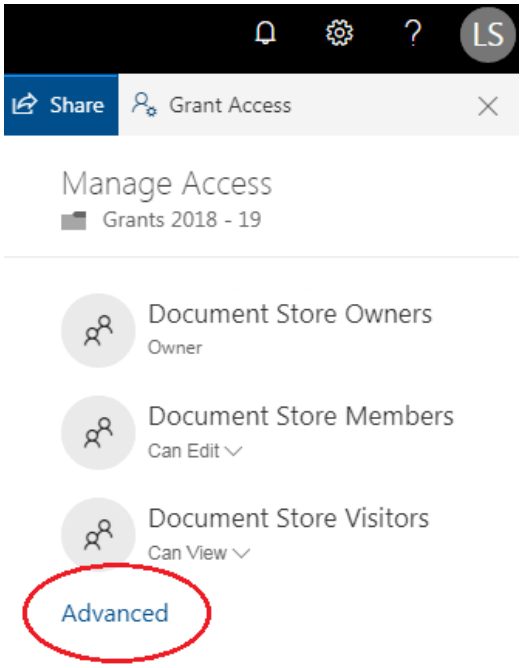
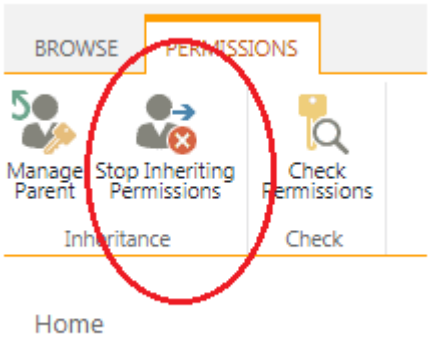
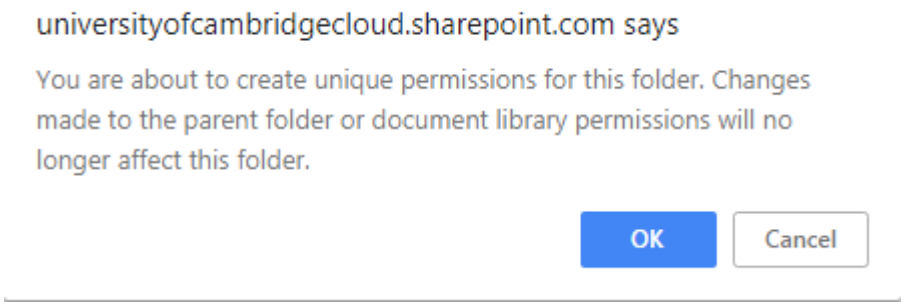
Select the “Advanced” option



Select the “Stop Inheriting Permissions” option (at the top left of the page)



A dialogue box will open – click OK



The folder is now secure.

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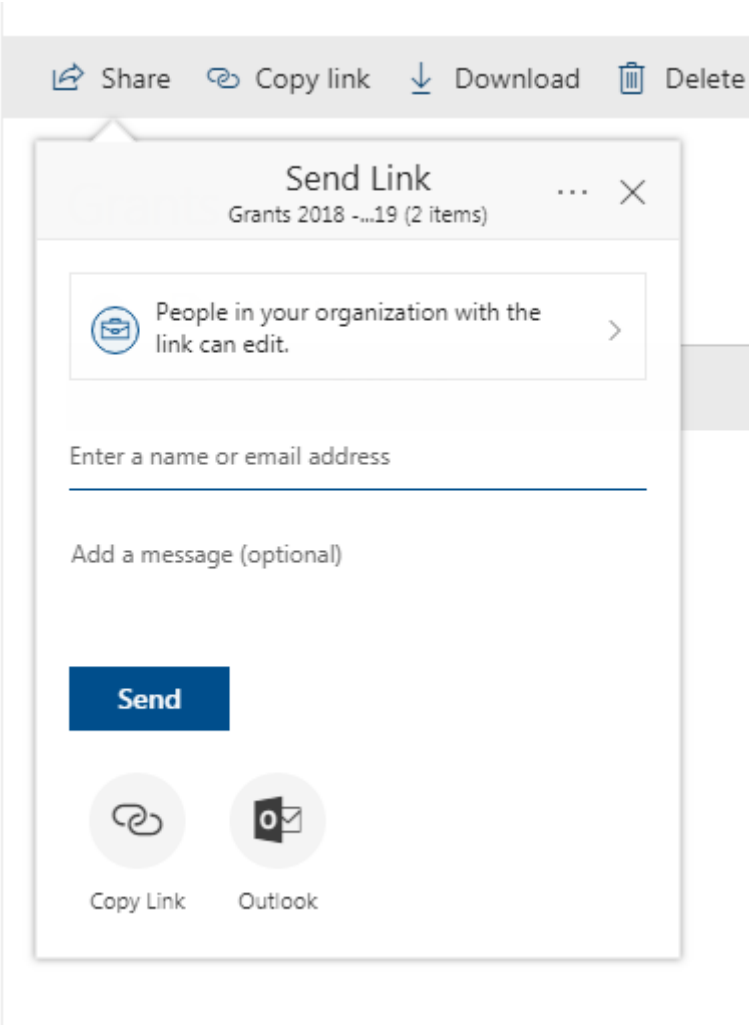
6.2 Adding Members to Restricted Groups (Power Users Only)

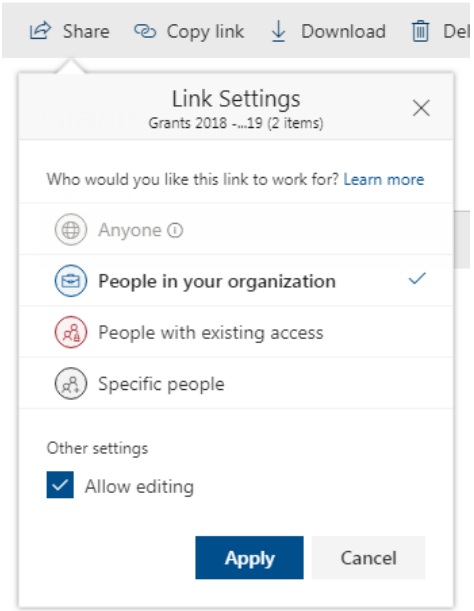
In order to share a restricted folder with other users, select the Share link (as above).

Enter the e-mail addresses of the people who are being given access



You can allow access to all within your organisation, people who already have access or specific people.

You can also set to give read only access by deselecting the “Allow Editing” tick box.



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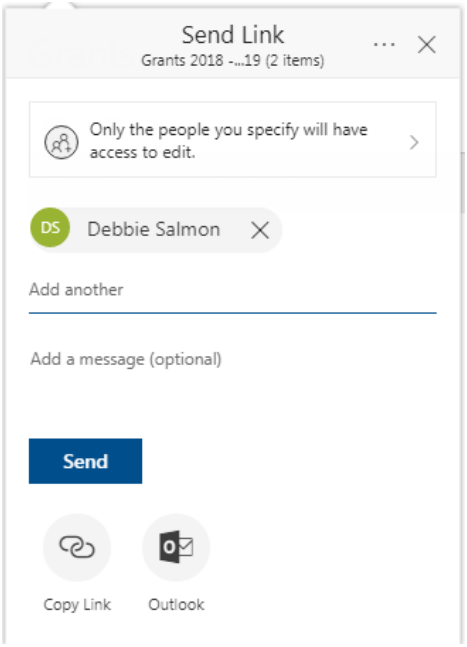
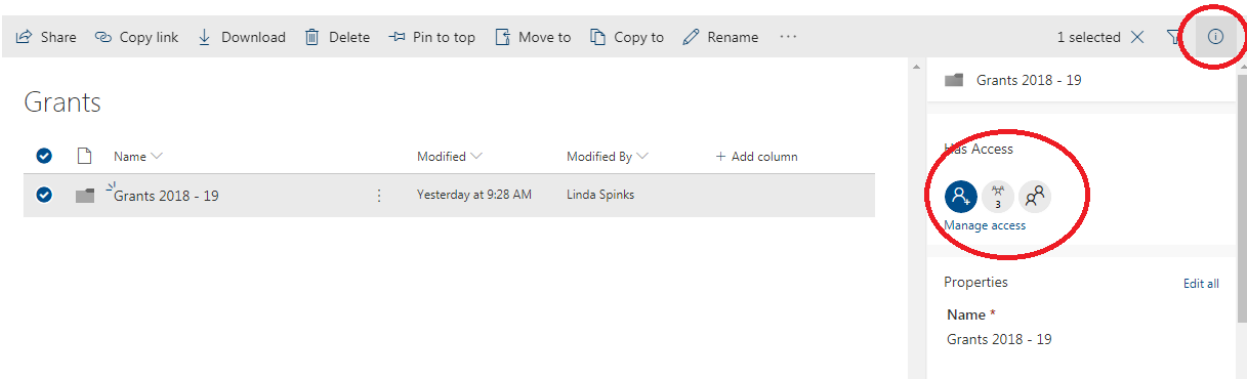
Once you have made your selection, click Send

A link to the folder or file will be sent to the people selected.



6.3 Remove Access to Files or Folders

In order to remove access, select the folder and click on the information icon, the folder properties will be displayed:



Click on the “Manage Access” option.

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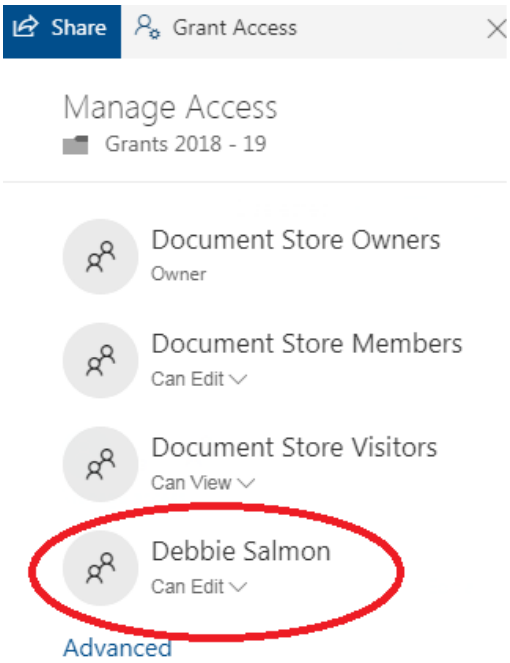
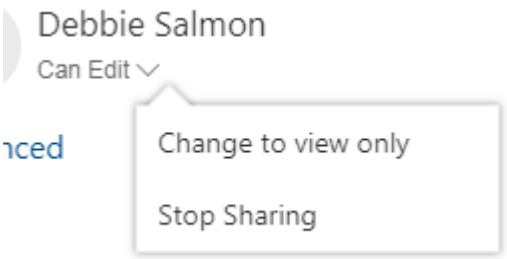


Select the user that you want to amend. You can either change to “View Only” or “Stop Sharing”.



The access will be updated accordingly.

Note: As there are multiple ways to manage access, if you are unsure please contact the Service Desk (servicedesk@uis.cam.ac.uk or (01223 3) 32999)

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