

# SharePoint Online


## An Introduction

IT Unit  
July 7, 2017  
Dustin Moore  
V. 1.0

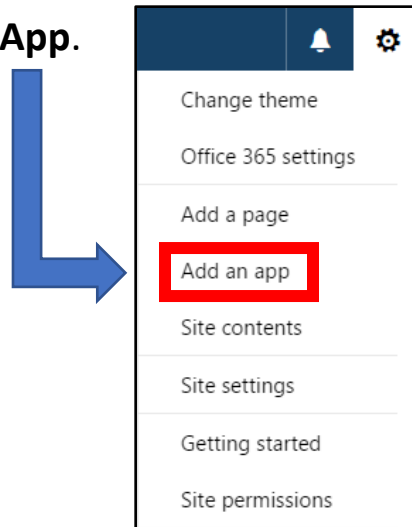
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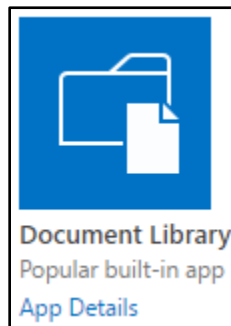
## Creating a Document Library

- Navigate to the site/page you wish to add a document library to.
- Click on the **Settings** Icon .


- Click **Add an App**.



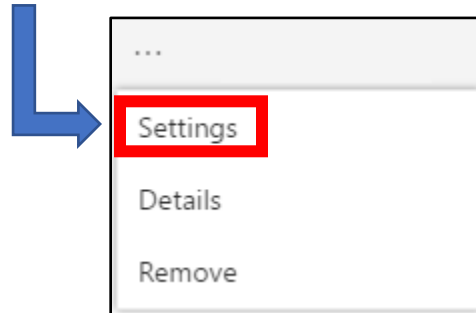
- Select **Document Library**.



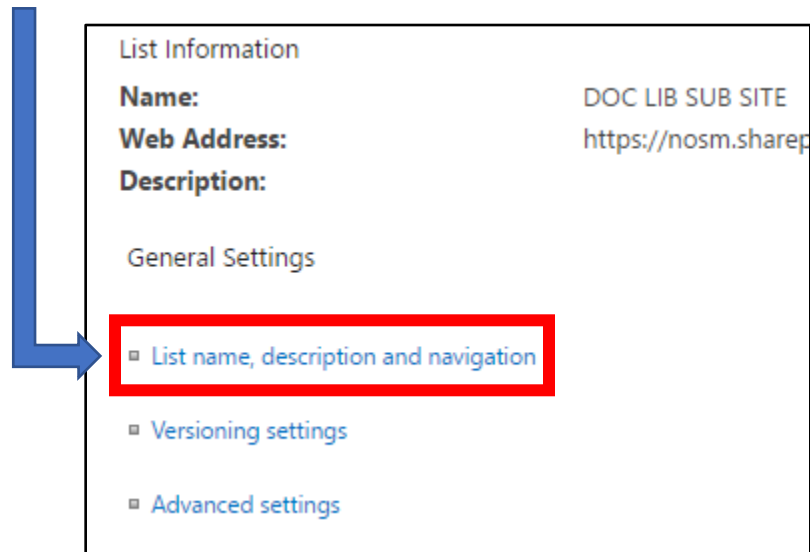
- Create a name for your library and click **OK**.
- Once you have named it, you are taken to the **Site Contents** page.

- FYI – SharePoint doesn't always automatically add the document library to the navigation pane on the left side of the screen.
  - To add it to the navigation pane, click on the ellipsis beside the document library name. 

- Click on **Settings**.




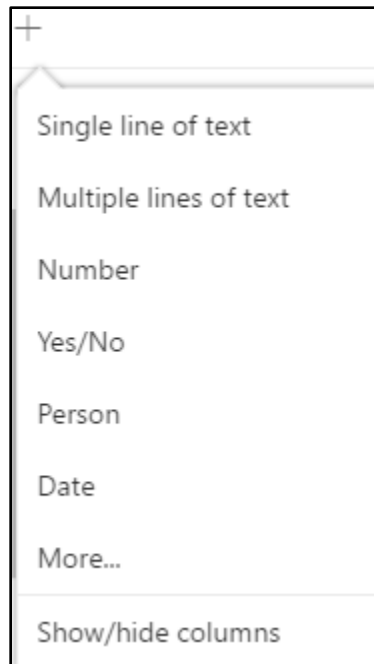
- Click on **List name, description, and navigation**.




- Here you can add a description for your library as well as add your library to the navigation bar (also known as Quick Launch).

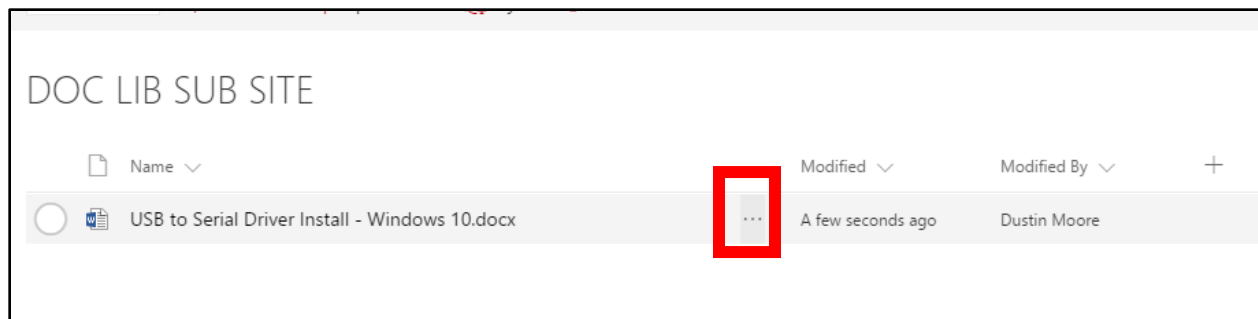
## Creating Custom Columns

- In the document library, click on the plus sign where all the column headings are listed. 
- From the menu that appears, you can choose to add one of the pre-defined columns listed, or select **More...** to be taken to a page with many more custom column options.

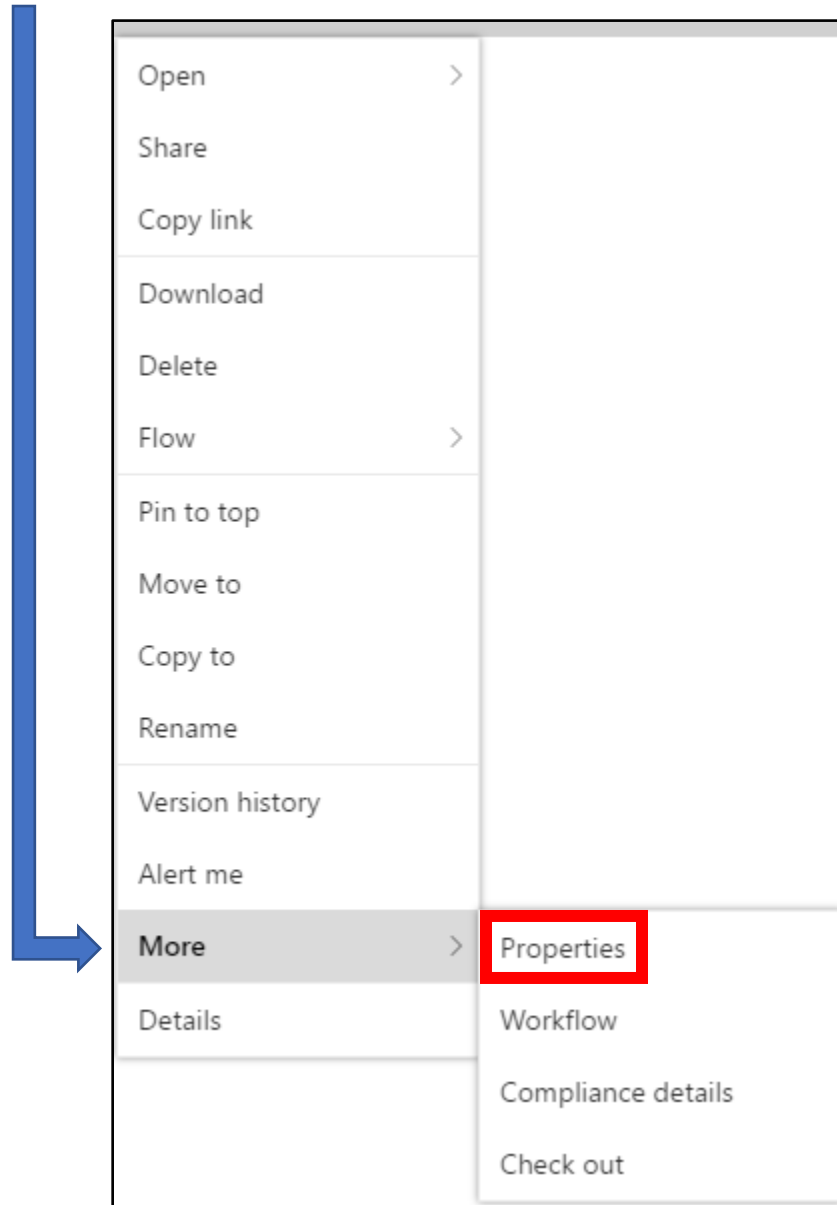


## Editing Metadata

- Click on the ellipsis  beside the item whose details you wish to modify.

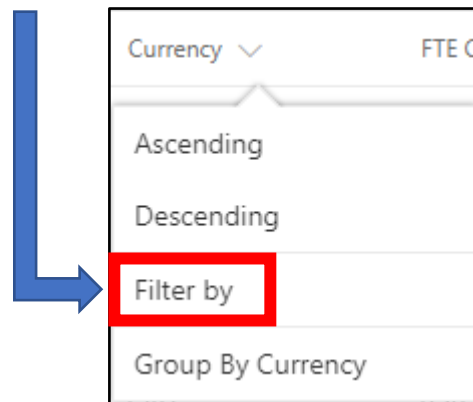


- From the menu that appears, select **More** and then **Properties**. From this screen, you can modify a large number of the selected files attributes.

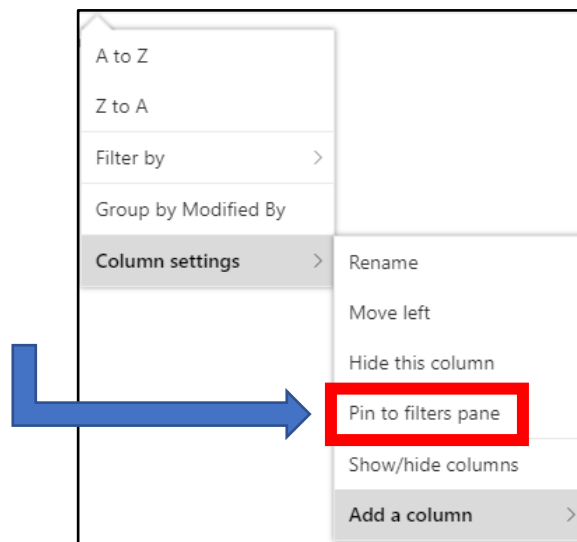


## Filtering

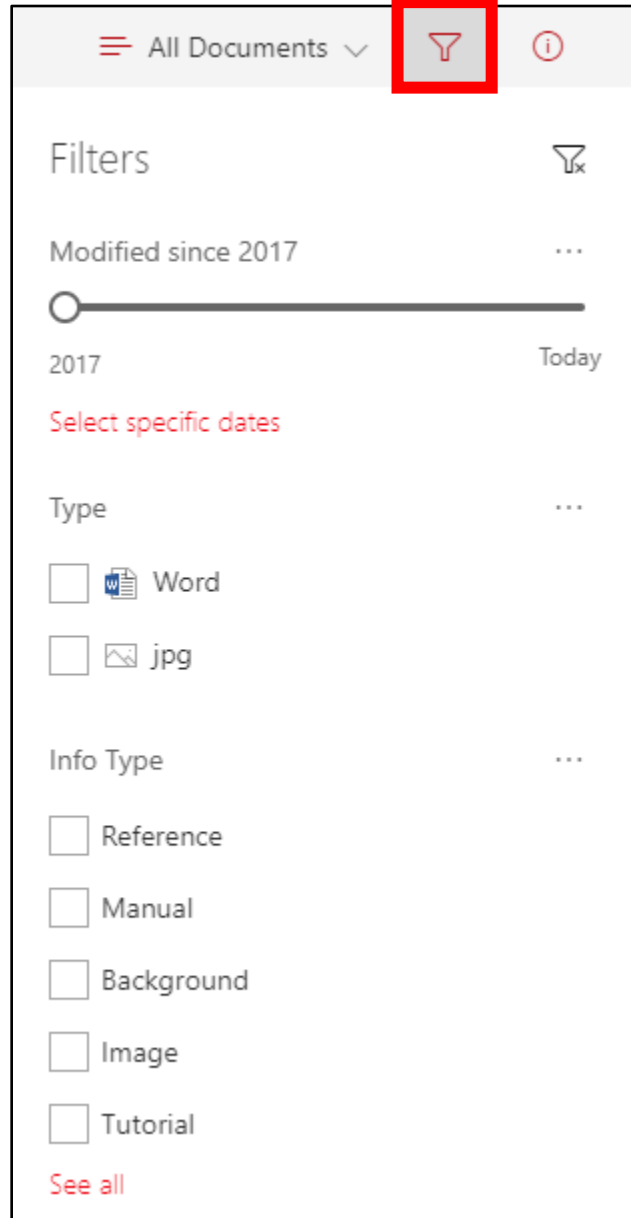
- Click on a column heading to open a drop-down menu for that column.
- Within this drop-down, you can filter by one or two presets, or, by going to **Filter by** and choosing from one of the smart filtering options populated there.



- For more advanced filtering, go to **Column Settings** within the drop-down menu and select **Pin to Filters Pane**.




- Now click the **Funnel**  to open the filters pane.

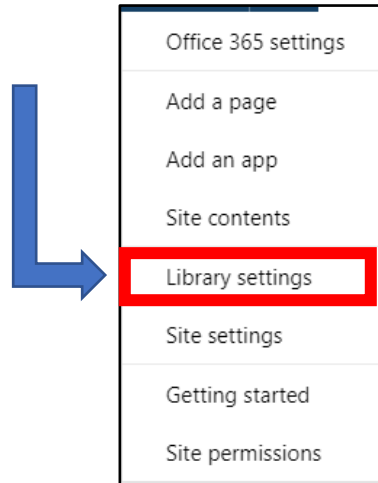


- Anything you add to this filters pane can be selected or deselected to filter files within the document library you are currently working in.

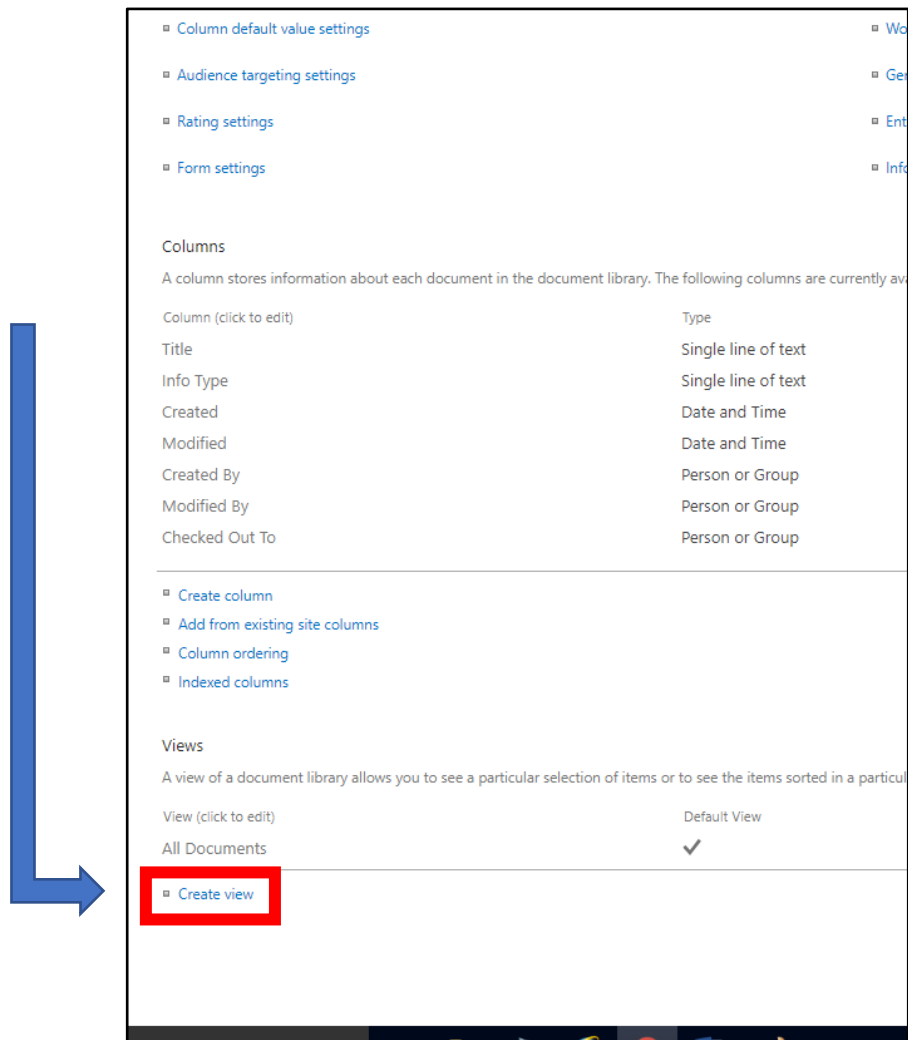


## Views

- While in a document library, click the Settings Icon  and choose **Library Settings**.





- Select **Create View** – towards bottom of the page.





- Choose **Standard View**.


Choose a view type


**Standard View**  
 View data on a Web page. You can choose from a list of display styles.


**Datasheet View**  
 View data in an editable spreadsheet format that is convenient for bulk editing and quick customization.


**Calendar View**  
 View data as a daily, weekly, or monthly calendar.


**Gantt View**  
 View list items in a Gantt chart to see a graphical representation of how a team's tasks relate over time.


**Custom View in SharePoint Designer**  
 Start SharePoint Designer to create a new view for this list with capabilities such as conditional formatting.

Start from an existing view

• All Documents

- Create a name for your view
- Do you want this to be the default view for the page? If so, check the appropriate box below the name field.
- Set the view as either **Personal** or **Public**.
- Select the fields and data you wish to include in your view and click **OK**.

View Name:

☐ Make this the default view  
(Applies to public views only)

View Audience:


☐ Create a Personal View  
Personal views are intended for your use only.

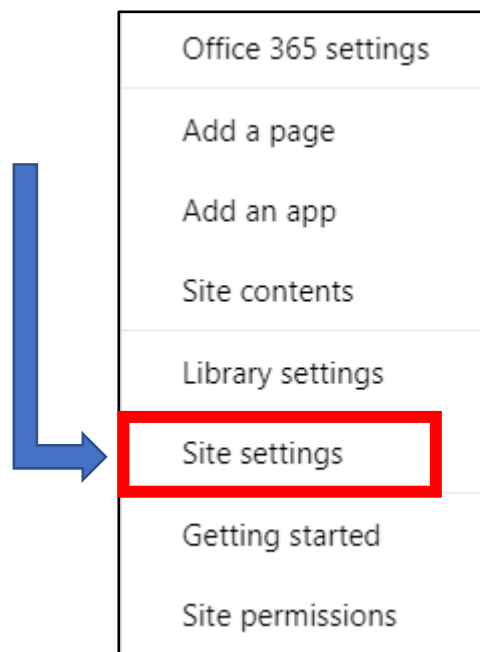
☒ Create a Public View  
Public views can be visited by anyone using the site.

Display	Column Name	Position from Left
<input checked="" type="checkbox"/>	Type (icon linked to document)	1 ▼
<input checked="" type="checkbox"/>	Name (linked to document with edit menu)	2 ▼
<input checked="" type="checkbox"/>	Modified	3 ▼
<input checked="" type="checkbox"/>	Modified By	4 ▼
<input checked="" type="checkbox"/>	Info Type	5 ▼
<input type="checkbox"/>	App Created By	6 ▼
<input type="checkbox"/>	App Modified By	7 ▼
<input type="checkbox"/>	Check In Comment	8 ▼
<input type="checkbox"/>	Checked Out To	9 ▼

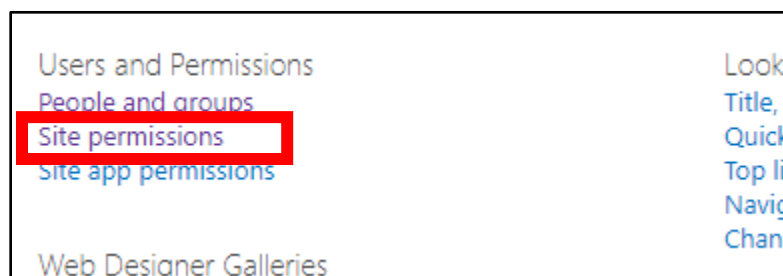
## Creating Groups

Groups are the most effective way to manage permissions. If you would like to grant permissions to a specific file, folder, library, or site, you should first create a group containing all users who you wish to have access.

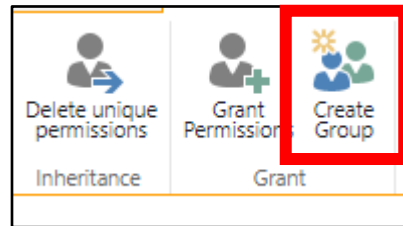
- Click on the  near the top right of the page.
- From the menu, select **Site Settings**.



- On this page, click **Site Permissions**.



- Now, click **Create Group** near the top left of the page.



- You'll be taken to a page that looks like this:

**Name and About Me Description**  
Type a name and description for the group.

Name:

About Me:

[Click for help about adding HTML formatting.](#)

**Owner**  
The owner can change anything about the group such as adding and removing members or deleting the group. Only one user or group can be the owner.

Group owner:

**Group Settings**  
Specify who has permission to see the list of group members and who has permission to add and remove members from the group.

Who can view the membership of the group?  
☒ Group Members ☐ Everyone

Who can edit the membership of the group?  
☒ Group Owner ☐ Group Members

**Membership Requests**  
Specify whether to allow users to request membership in this group and allow users to request to leave the group. All requests will be sent to the e-mail address specified. If auto-accept is enabled, users will automatically be added or removed when they make a request.

Allow requests to join/leave this group?  
☐ Yes ☒ No

Auto-accept requests?  
☐ Yes ☒ No

Send membership requests to the following e-mail address:

**Give Group Permission to this Site**  
Specify the permission level that you want members of this SharePoint group to have on this site. If you do not want to give group members access to this site, ensure that all checkboxes are unselected.

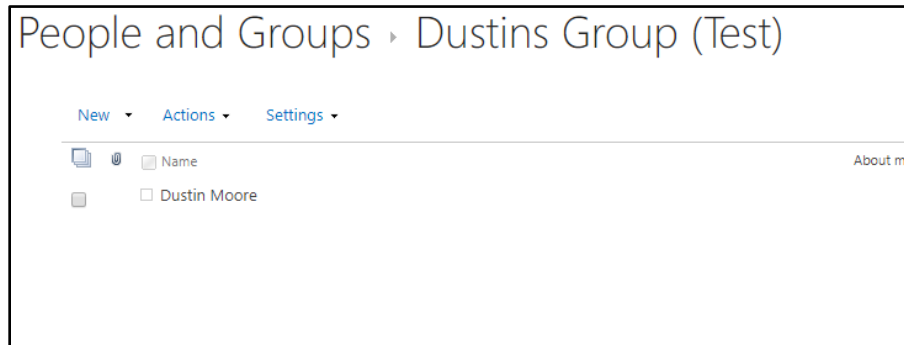
[View site permission assignments](#)

Choose the permission level group members get on this site: <https://nosm.sharepoint.com/sites/dustin/subsitetest>

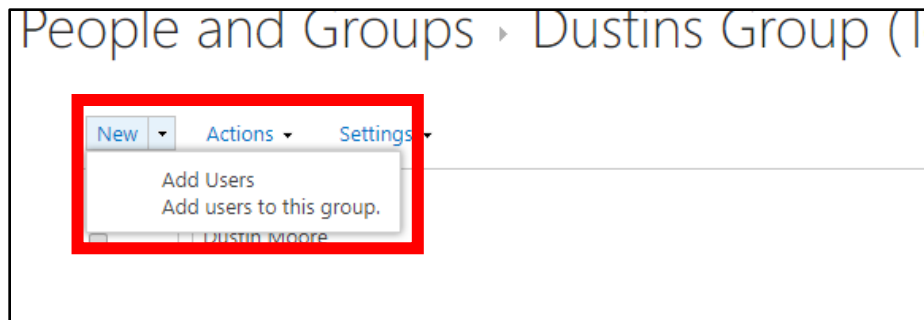
☐ Full Control - Has full control.  
☐ Design - Can view, add, update, delete, approve, and customize.  
☐ Edit - Can add, edit and delete lists; can view, add, update and delete list items and documents.  
☐ Contribute - Can view, add, update, and delete list items and documents.  
☐ Read - Can view pages and list items and download documents.  
☐ View Only - Can view pages, list items, and documents. Document types with server-side file handlers can be viewed in the browser but not downloaded.

- Complete the form, ensuring to set the appropriate group permissions at the bottom, then click **Create**. Make note of the group name you chose as you will need to know this later when granting permissions. For a more detailed explanation of the various sets of permissions please see the three **Permissions** sections of this guide as well as the FAQs section.

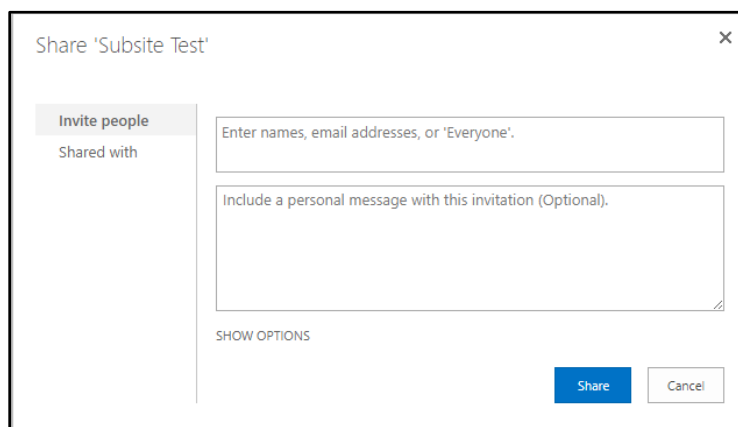
- You will now be taken to a screen showing you the group and its members:



- To add people to this group, click on **New** and then **Add Users**.



- In the window that appears, enter the names (people internal to NOSM) or email addresses (internal, or external if external sharing is enabled) of the people who you wish to add to the group. You can also include an optional message which will be emailed to all those added to this group. If you do not want an email sent, click **Show Options** then uncheck the checkbox that says, **Send an email invitation**. Now click **Share**.




## Permissions – Getting Started

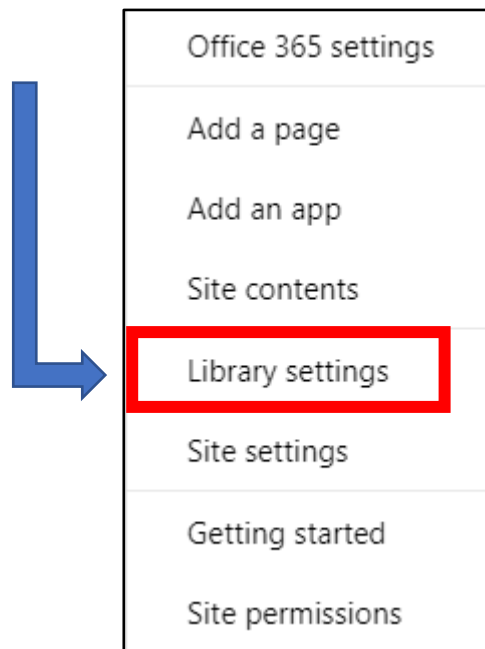
Before you can set unique permissions at the library level or document level, you must first stop inheriting permissions.

Once you have completed this step you may move on to setting Library Level permissions, and then (if desired) Document Level permissions as described in the two following sections.

This section will walk you through stopping the inheritance of permissions for any given document library.

You must stop inheriting permissions for each document library that you wish to customize access for.

- Navigate to the document library you wish to edit permissions for.
- Click on the , near the top right of the page.
- From the menu, select **Library Settings**.



- From this page, select **Permissions for this document library**.

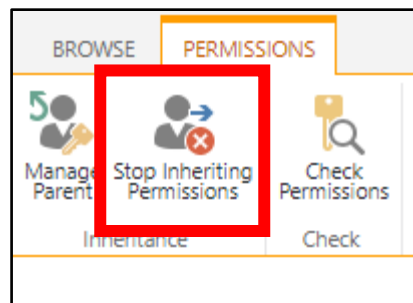
Web Address: <https://nosm.sharepoint.com/sites/dustin/subsite/test/Permissions-Testing-Library/Forms/AllItems.aspx>

**Description:**

<p>General Settings</p> <ul style="list-style-type: none"> <li>List name, description and navigation</li> <li>Versioning settings</li> <li>Advanced settings</li> <li>Validation settings</li> <li>Column default value settings</li> <li>Audience targeting settings</li> <li>Rating settings</li> <li>Form settings</li> </ul>	<p>Permissions and Management</p> <ul style="list-style-type: none"> <li>Delete this document library</li> <li>Save document library as template</li> <li><b>Permissions for this document library</b></li> <li>Manage files which have no checked in version</li> <li>Workflow Settings</li> <li>Generate file plan report</li> <li>Enterprise Metadata and Keywords Settings</li> <li>Information management policy settings</li> </ul>
--	---

Columns


- Click on **Stop Inheriting Permissions**.

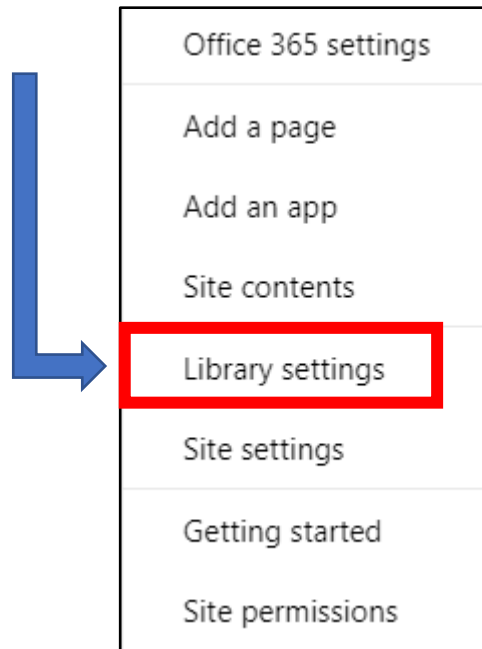


- You are now ready to set Library Level Permissions.

## Permissions – Library Level

Please complete “**Permissions – Getting Started**” before following this tutorial. You will be unable to set Library Level permissions if you have not completed this prerequisite section.

- Navigate to the document library you wish to edit permissions for.
- Click on the  near the top right of the page.
- From the menu, select **Library Settings**.





- From this page, select **Permissions for this document library**.

Web Address: [https://nosm.sharepoint.com/sites/dustin/subsite/test/Permissions Testing Library/Forms/AllItems.aspx](https://nosm.sharepoint.com/sites/dustin/subsite/test/Permissions%20Testing%20Library/Forms/AllItems.aspx)

**Description:**

General Settings

- List name, description and navigation
- Versioning settings
- Advanced settings
- Validation settings
- Column default value settings
- Audience targeting settings
- Rating settings
- Form 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

Columns

- Now, select **Grant Permissions**.

BROWSE PERMISSIONS

Delete unique permissions | **Grant Permissions** | Edit User Permissions | Remove User Permissions | Check Permissions

Inheritance | Grant | Modify | Check

- In the window that appears, type in the group(s) you wish to give access to this library and click **Share**.

Share 'Permissions Testing Library' and its contents

Shared with ☐ Mike Korolenko

Invite people

Shared with

Include a personal message with this invitation (Optional).

☒ Share everything in this folder, even items with unique permissions.

SHOW OPTIONS

**Share** Cancel

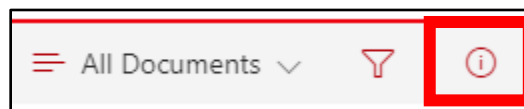
- **Full Control** gives users the ability to change site settings, it is advised that only two to three people possess this level of permission for any given library. These users are referred to as **Owners**
- **Edit** allows users to edit and add documents but does not allow them to change the structure of the library or site (cannot add columns to library). Users with these permission levels are referred to as **Members**.
- **Read** permissions are limited to reading documents. These users cannot even download files. Users who possess these permissions are known as **Visitors**.

## Permissions – Document Level

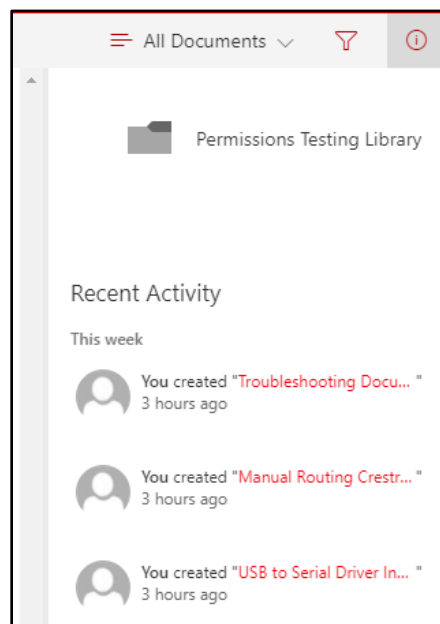
Please complete **“Permissions – Getting Started”** AND **“Permissions – Library Level”** before following this tutorial. You will be unable to set Document Level permissions if you have not completed this prerequisite section.

You need to set permissions at the library level before you can properly set permissions at the document level. Once you have set up your permissions at the library level, please follow the tutorial in this section to set permissions for each document in the library.






- First, open the **Details Pane**.






- Once opened, it should look something like this:



- Now find the document whose permissions you wish to edit, and click to the left of its title. A checkmark should appear where you just clicked.

 Name	Modi
 Manual Routing Crestron 32x32 switcher Nov 18 2016.docx	3 hou
 Troubleshooting Document.docx	3 hou
  USB to Serial Driver Install - Windows 10.docx	... 3 hou


- The details pane should now list information related to the selected document. It will be similar to this:

1 selected




**Windows 64-bit Fix for**  
 All Windows 64-bit operating systems including Windows 10  
 Profile: USB to Serial Adapter (28 other items)  
 Source: https://www.crestron.com/Products/USB-to-Serial-Adapter.aspx  
 Driver Version: 3.3.2.632  
 Driver Date: 10/20/2016  
 Supported device ID and product string: VID\_00000000\_0000 for "Profile: USB to Serial Adapter"

- Download and save the "USBtoSerial\_Basic\_installer.exe" at the link below:  
<https://www.crestron.com/Products/USB-to-Serial-Adapter.aspx>
- You can just click. If it says something like "make a better" "better" "not worth it" or "no to save all the good of" "better" "not worth it" you might want to double your own work before running the installer.
- Unplug all USB to Serial adapters and double click on the installer "USBtoSerial\_Basic\_installer.exe".
- When it prompts you, plug in one (1) of your USB to Serial adapters and click "Continue".
- Restart your computer.
- Unplug the installer and plug back in again. That's it!

**Troubleshooting:** You must follow each step in this process precisely. If you still receive an error after



USB to Serial Driver Install ...  
 21.5 KB - 3 hours ago



### Properties

[Edit all](#)

**Name \***  
 USB to Serial Driver Install - Windows 10.docx

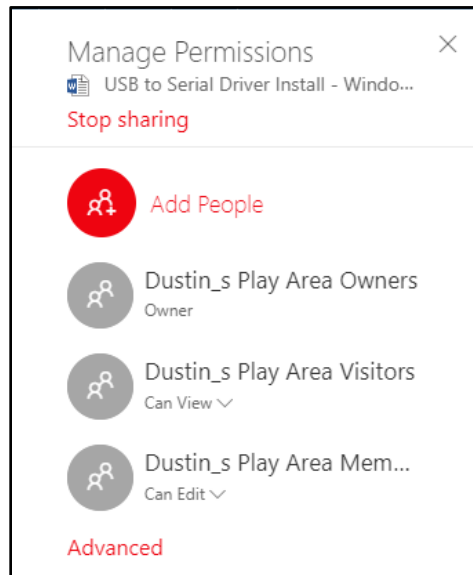
**Title**  
 Enter text here

**Has Access**

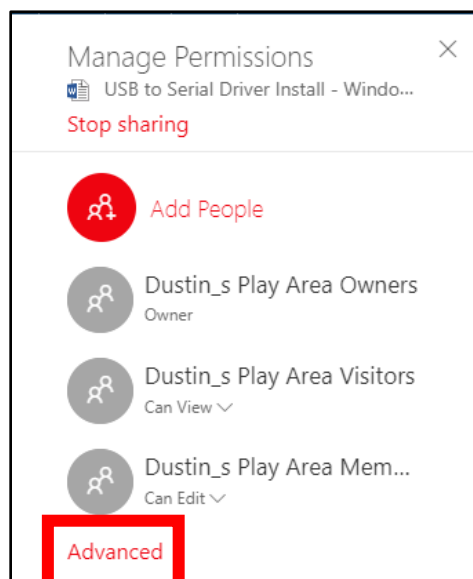








[Change permissions](#)

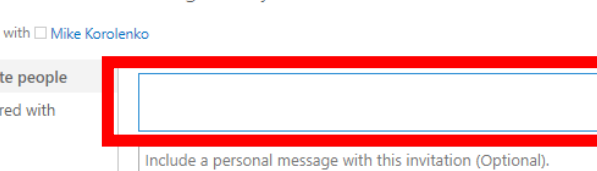
- Below **Has Access** you should see the option to **Change permissions**. Click this to open the Permissions Panel, which looks like this:



- From this panel, you can grant access to individual people by clicking **Add People**. We strongly advise against inviting people this way as it can cause confusion. The correct way to manage document level permissions is by going to **Advanced**.



- | BROWSE  |   | PERMISSIONS   |   |  |
|---|---|---|---|--|
|  |  |  |  |  |
| Delete unique permissions   | Grant Permissions   | Edit User permissions   | Remove User Permissions   | Check Permissions  |
| Inheritance   | Grant   | Modify  |   | Check  |


- 
- Share 'Permissions Testing Library' and its contents
- Shared with ☐ Mike Korolenko
- Invite people**
- Shared with
- Include a personal message with this invitation (Optional).
- ☒ Share everything in this folder, even items with unique permissions.
- SHOW OPTIONS
- Share** Cancel

If you choose to set document level permissions you must do so for each document within the library. Missing a document will result in it using the last set of permissions it inherited from its parent.


## Sharing

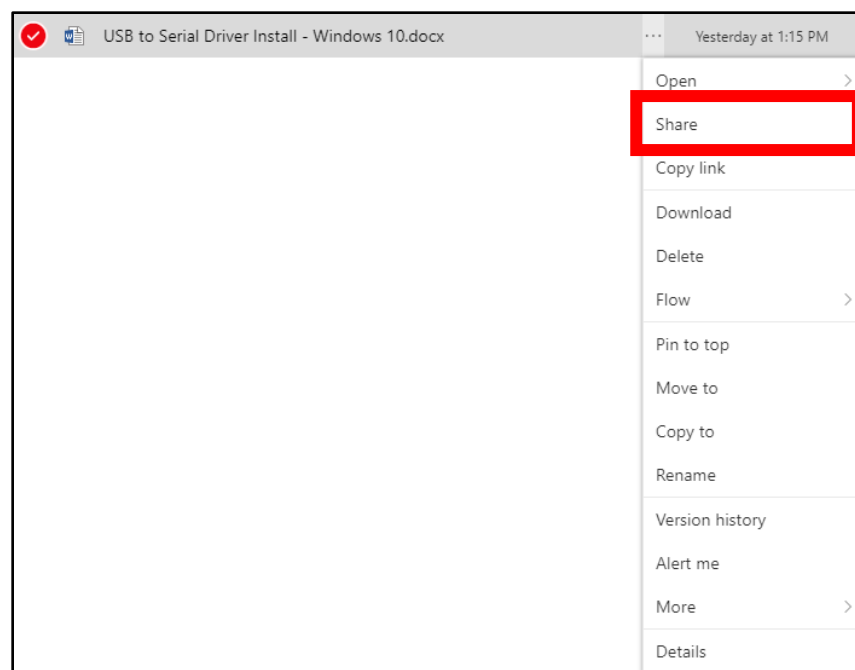
Sharing is not the same as giving someone permission. While both can technically achieve the same result, sharing is best done with one or two people, or with a few users who are not part of a group. You can share with groups too, but if you intend to share with a group standard practice is to grant permission instead.

In this guide, you will see how to share a single document. Sharing folders, libraries, and sites can be done in the same way but are not covered in this guide.

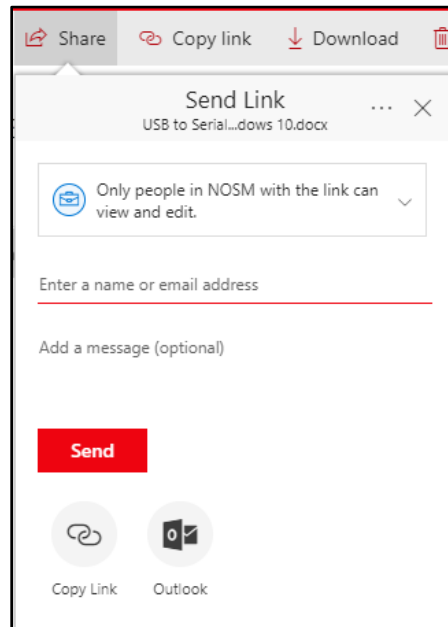
- Locate the file you wish to share. Hover your mouse over it so an ellipsis  appears as shown below.



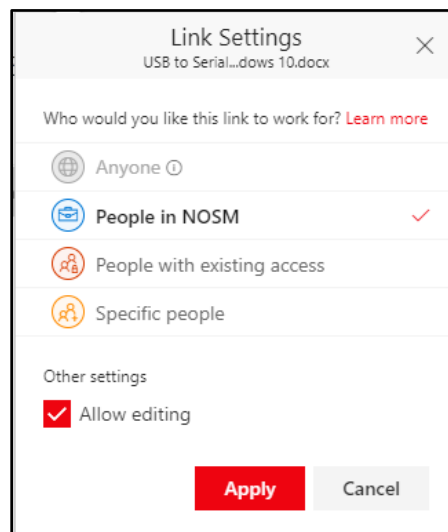
- Now click the ellipsis , and from the menu that appears click **Share**.



- A pop-up menu will appear as shown below. Enter the email address or name (if internal) or the person you wish to share with.



- You will notice that at the top of this box it says, **Only people in NOSM with the link can view and edit.** If you click on this, the pop-up changes the information that is displayed and will now show you several sharing options.



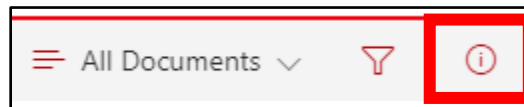


- The person you specified to share with will receive an email with a link to the document you specified. If the recipient cannot find the invite email, have them check their junk mail.

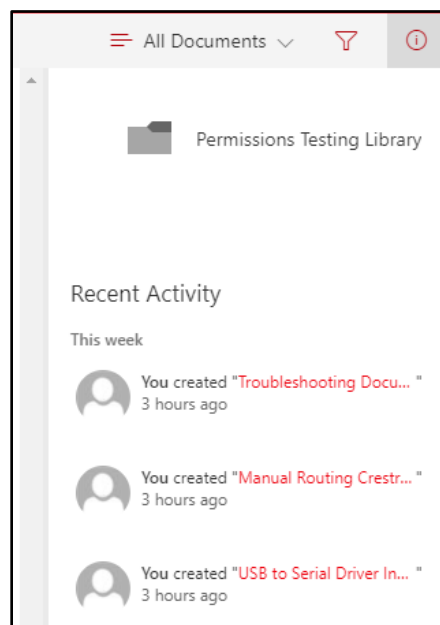
## Stopping Sharing

After you have shared a document, at some point you may need or want to stop sharing it.

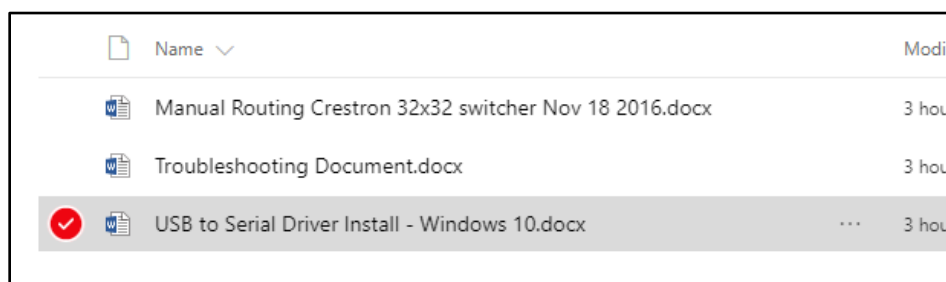
- First, navigate to the folder or library that contains the file you wish to stop sharing. Then, be sure to open the **Details Pane**.



- Once opened, it should look something like this:



- Now find the document you wish to stop sharing, and click to the left of its title. A checkmark should appear where you just clicked.



- Windows 64-bit Fix for:**

  - all Windows 10 desktop systems including Windows 10
  - Purple USB to Serial Adapter COM driver install
  - Driver version V2.1.0.0
  - Device ID VID\_04D3 & PID\_015E
  - Supported device IDs and product strings: "VID\_04D3&PID\_015E for 'Purple USB-to-Serial Converter Port'
  - Download and Save the "V2.1.0.0\_MSI... Installer.exe" at the link below:  
[http://www.burtonsworld.com/downloads/V2.1.0.0\\_MSI\\_V2.1.0.0.exe](http://www.burtonsworld.com/downloads/V2.1.0.0_MSI_V2.1.0.0.exe)
  - You can just click it if you're wanting to make a custom installation. But want like it, so to save all the good of dealing with that beast you might want to disable your anti-virus before running the installer.
  - Clicking off "USB to Serial adapters and Enable click on the installer "V2.1.0.0\_MSI\_V2.1.0.0.Installer.exe"
  - If there's prompts you plug in one (1) of your USB to Serial adapters and click "Continue".
  - Select your computer.
  - Clicking the installer and plug back in again. That's it!

Troubleshooting: This must follow our steps in the process precisely. If you otherwise see some other

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## USB to Serial Driver Install ...

21.5 KB - 3 hours ago

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### Properties

[Edit all](#)

<b>Name *</b>  USB to Serial Driver Install - Windows 10.docx	
<b>Title</b>  Enter text here	

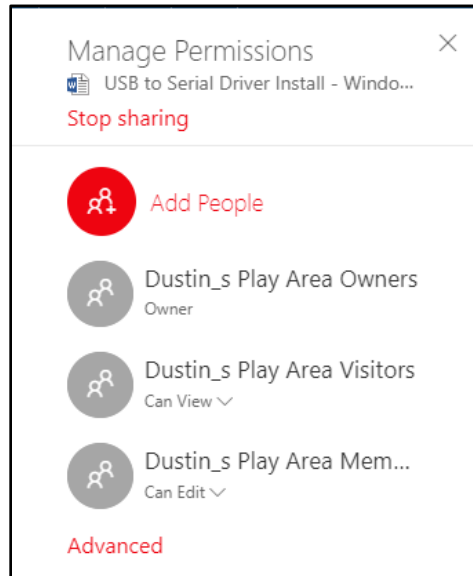
---

**Has Access**

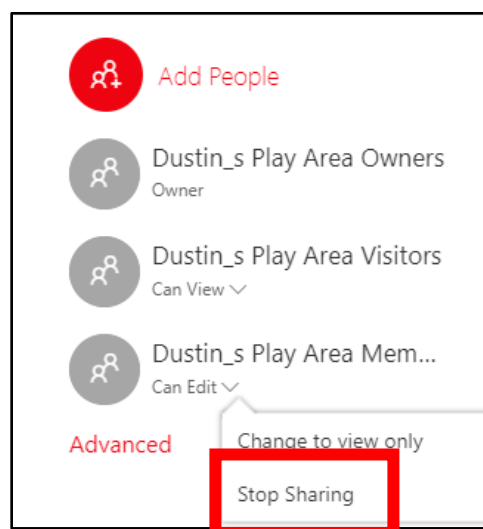
3

[Change permissions](#)

- Below **Has Access** you should see the option to **Change permissions**. Click this to open the Permissions Panel, which looks like this:



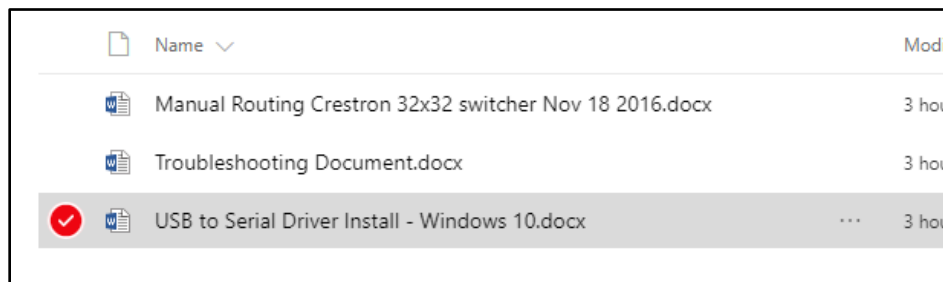
- Listed here is every person and group that has access to this document. You may also see links here as well if someone decided to share something via a link (not recommended).
- Underneath each person or group, you will see their permissions (**Can View**, **Can Edit**, etc.). To stop sharing, simply click in the small arrow beside the permission level and select **Stop Sharing**.




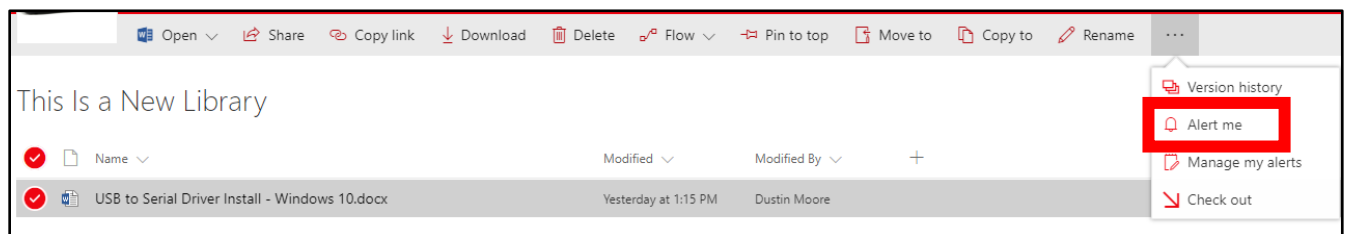
## Setting and Managing Alerts

Setting alerts for documents can be handy. Doing so will have SharePoint send you an email whenever changes are made to a document.

- Find the document you wish to set an alert for, and click to the left of its title. A checkmark should appear where you just clicked.



- Just above the list of documents, you should see a menu bar like the one pictured below. Click on the ellipsis  , then click **Alert me**.



- A new window will appear like the one on the next page. In this window, you can give your alert a name, specify who is to receive the alerts, the delivery method (email or SMS), what type of alert you want to set, and when you want the alert to be sent. Once you have filled out the pertinent information, click okay.

Alert me when items change

OK

Cancel

Alert Title

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

This Is a New Library: USB to Serial Driver

Send Alerts To

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

Users:

Dustin Moore x

Delivery Method

Specify how you want the alerts delivered.

Send me alerts by:

☒ E-mail 

dusmoore@nosm.ca

☐ Text Message (SMS) ☐ Send URL in text message (SMS)

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

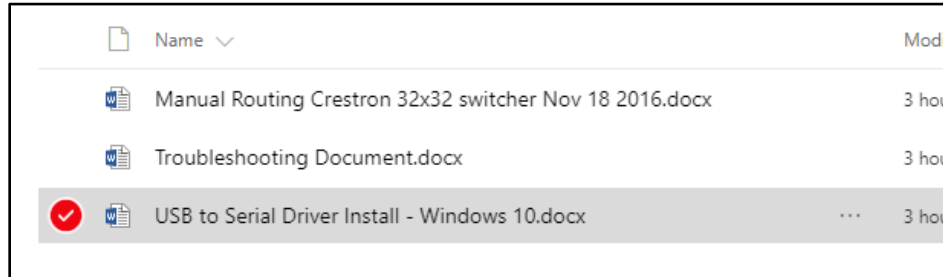
Time:


Wednesday ▾

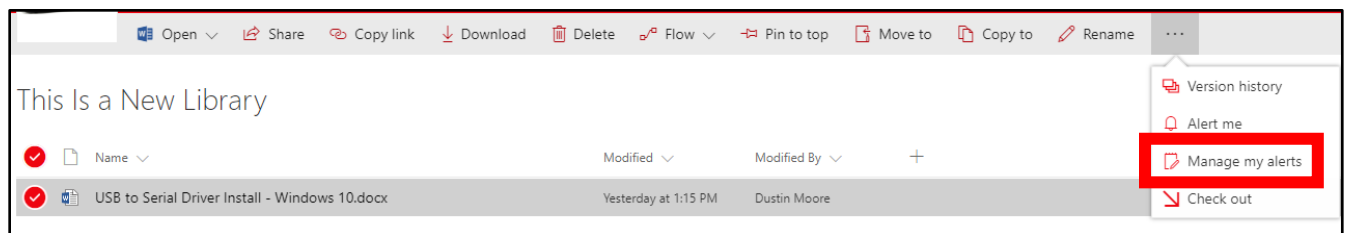
9:00 AM ▾

- Upon completion, you should receive and email informing you that you have successfully set an alert for your document.

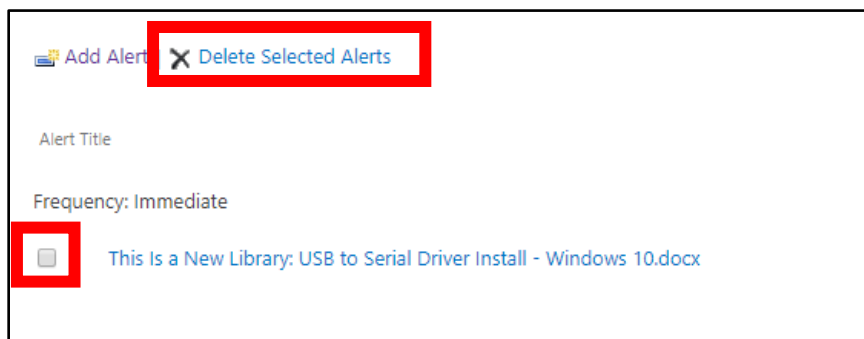
- Should you wish to turn off an alert, find the document you wish to disable the alert for, and click to the left of its title. A checkmark should appear where you just clicked.



- Just above the list of documents, you should see a menu bar like the one pictured below. Click on the ellipsis  , then click **Manage my alerts**.



- You will be taken to a new page like the one below. Place a checkmark in the box to the left of the document whose alert you wish to remove, then click **Delete Selected Alerts**.



## FAQS

## ***I can't access a site, menu, setting or other components described in this guide. Why is that?***

In SharePoint Online, every user has their own permission level. Some permission levels do not have access to all areas of this site or have limited access to specific features and settings. If you cannot follow along with one of the steps in the guide, it is likely that you don't possess adequate permissions. Contact the administrator of the site or library you are trying to manipulate to discuss elevating your permissions or to gain assistance in completing your task.

***I shared a document with someone and they haven't received the invite email. What should I do?***

First, you should verify that you have actually shared the document with that person. See the section “**Stopping Sharing**” in this guide to see the fastest way to view current permissions on a document. If you have shared the document with the appropriate party, then have them check their junk mail. Some inboxes detect the invite email as spam.



As a rule, you want to give people the most limited access you can while not interfering with their ability to complete their work. Within SharePoint Online, there are many different permission levels that can be set. Each one dictating what can and cannot be accessed.

Each user and group in SharePoint has a permission level set for them. To help make things a little easier, there are three pre-made groups that you can assign people to – each one with its own set of permissions already assigned.

**Site Owners** grants **Full Control** permissions. **Members** grants **Edit** level permissions. And **Visitors** grants **Read** permissions.

The chart below helps to explain the differences between six of the main types of permissions that can be set for any given user or group.

Note that you see **Full Control**, **Edit**, and **Read** but you do not see **Site Owners**, **Members**, or **Visitors**. That is because this chart is listing permission levels not groups.

A simplified overview of this information is available in the **“Permissions – Library Level”** section of this guide.

Permission	Full Control (Owner)	Design	Edit (Member)	Contribute	Read (Visitor)	Limited Access
Manage Permissions	x					
Create Subsites	x					
Add and Customize Pages	x	x				
Apply Themes and Borders	x	x				
Apply Style Sheets	x	x				
Create Groups	x					
Browse Directories	x	x	x	x		
View Pages	x	x	x	x	x	
Manage Alerts	x					
Manage Lists	x	x	x			
Add Items	x	x	x	x		
Edit Items	x	x	x	x		
Delete Items	x	x	x	x		
Approve Items	x	x				
Create Alerts	x	x	x	x	x	

## ***What if I have questions about things not covered in this guide?***

This guide is only a brief introduction to SharePoint Online and more features will be discussed in future training materials. However, if you want clarification on anything relating to SharePoint or would like one-on-one training, please contact [helpdesk@nosm.ca](mailto:helpdesk@nosm.ca) and one of our technologists will make the appropriate arrangements.

## Version History

DO NOT REMOVE THIS VERSION RECORD FROM THIS DOCUMENT		
Version	Date	Authors/Comments
1.0	2017 07 07	Dustin Moore (Information Technologist, IT – Technology)