Information Management and Technology

SharePoint

End User Manual

Please send feedback or suggestions for updates to the following email address IT.Training@lse.ac.uk

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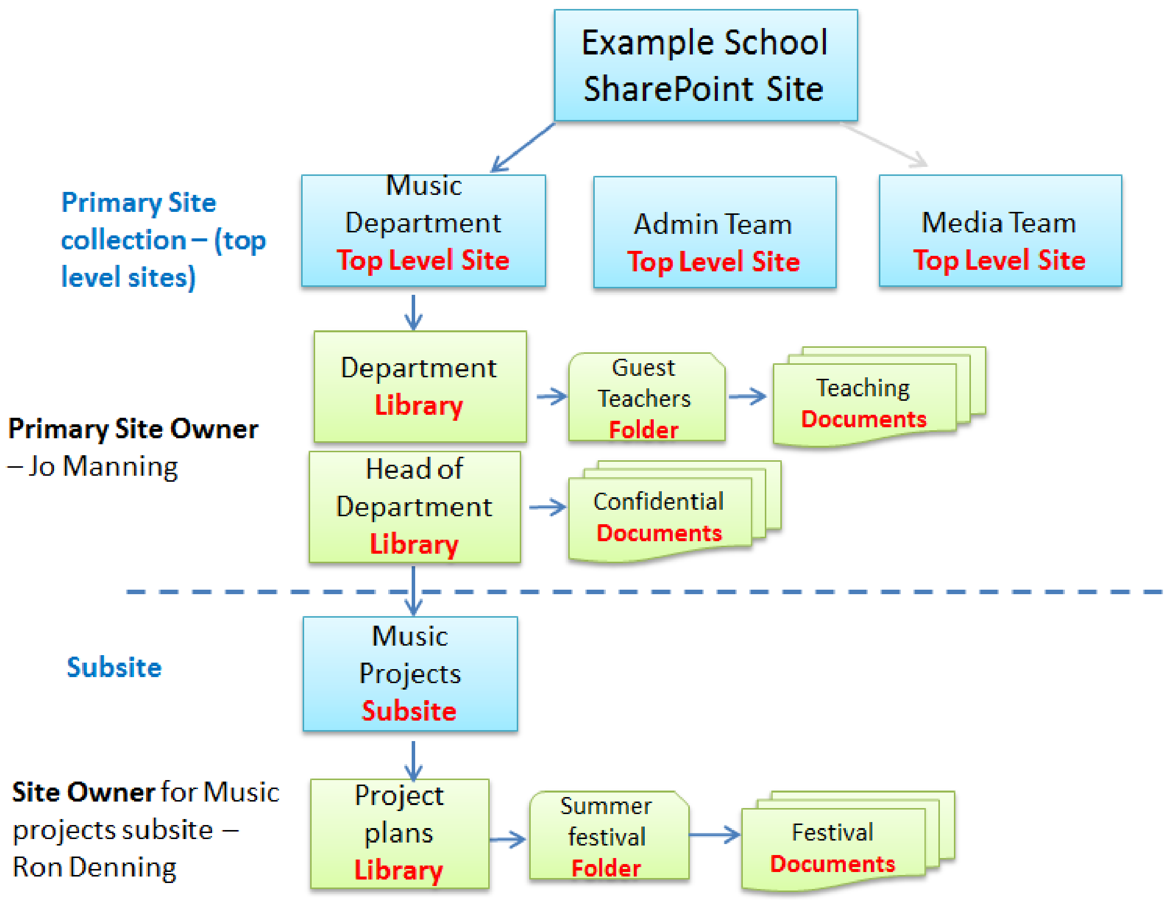
Introduction to SharePoint

Your SharePoint Site

SharePoint has been introduced into the LSE as a tool for collaborative working on files and documents relating to current projects. SharePoint also has some other useful tools such as a calendar, which can help you plan and work on projects together. SharePoint is not a file storage system.

Your SharePoint team or department site will be known as the primary site collection or top-level site. This is because it is possible to create more sites within it for specific and limited teamwork. These extra sites are known as subsites.

Your site will be based on a team site type chosen to most closely reflect your team's requirements. The team site type will have a ready-made layout for libraries and additional resources such as calendars and tasks. The site can then be modified to suit your team requirements. The layout below is a standard layout for a SharePoint team site **(this is an example – not the LSE SharePoint site)**



SharePoint Terminology

SharePoint Site	The SharePoint site is the overall LSE SharePoint site from which department and team sites are created. **See the example above.**
Primary Site Collection	Each team or department site is a site collection. **See the example above.**
Subsite	A team site within an existing primary site collection. **See the example above.**
Library	A library can be created to hold a certain type of file or document or relate to a particular project or task. **See the example above.**
Folder	Folders can be used to group document and files.
Nominated Primary Site owner	The owner of your team or department site. The Site Owner is responsible for all the content on the site and how it is used. They are also accountable for the entire site including subsites.
Nominated Subsite owner	Responsible for the subsite they create, all the content and how it is used.
Permissions	These are set by the Site Owner and will determine what libraries, folders or documents a SharePoint user can share, edit or view.
Collaboration	Sharing work in SharePoint. Most collaboration will be on shared documents where several SharePoint users may be updating the same documents.
Document Sharing	To share a file or document with a SharePoint User for collaborative working or just to view the content.
SharePoint End User	Everyone who has permissions to use the content of a site, other than the Site Owner.
SharePoint Calendar	A shared calendar for everyone in the SharePoint team to view.
SharePoint Tasks	Shared tasks for everyone in the SharePoint team. Can be used to keep track of group projects and assign tasks to a particular SharePoint user.
Contacts	Shared contacts for everyone in the SharePoint team to use. Can be exported and used in Outlook if required.
Ribbon	A context sensitive menu bar which appears at the top of a SharePoint page.
SharePoint Page	A SharePoint screen of information.
Lists	A list of contacts or tasks within SharePoint.

How to log into your SharePoint site

Most users of SharePoint will receive a link to your site through the email in the way of an invitation to join the SharePoint team site. By clicking on the link, you will then have access to your site.

Because SharePoint operates in Office 365, there will be an Office 365 login screen that you will require your credentials. Follow the instructions below:

- Type your full email address and your usual network password; there is no need to type LSE\
- You will be directed to SharePoint immediately. If this does not happen, click **Sign In**

On most occasions it will not be necessary to type your password. As soon as you click into the password field, Office 365 will direct you to your team SharePoint site.

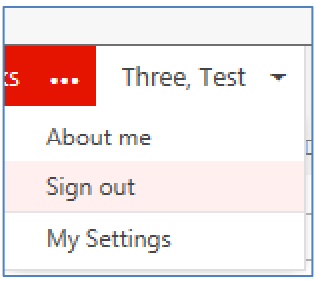
Because you are working through your browser to access SharePoint, you may on occasion need to complete the Office 365 login screen again once you are in SharePoint. This will normally happen when you want to use one of the Office integration tools. This happens because your browser will not always recognise the redirection as a trusted area. To overcome this, just tick the box on the pop-up screen that says 'Keep me signed in'.

If you need more help with logging in, please click on this link
http://www.lse.ac.uk/intranet/LSEServices/IMT/facilities/sharepoint/home.aspx

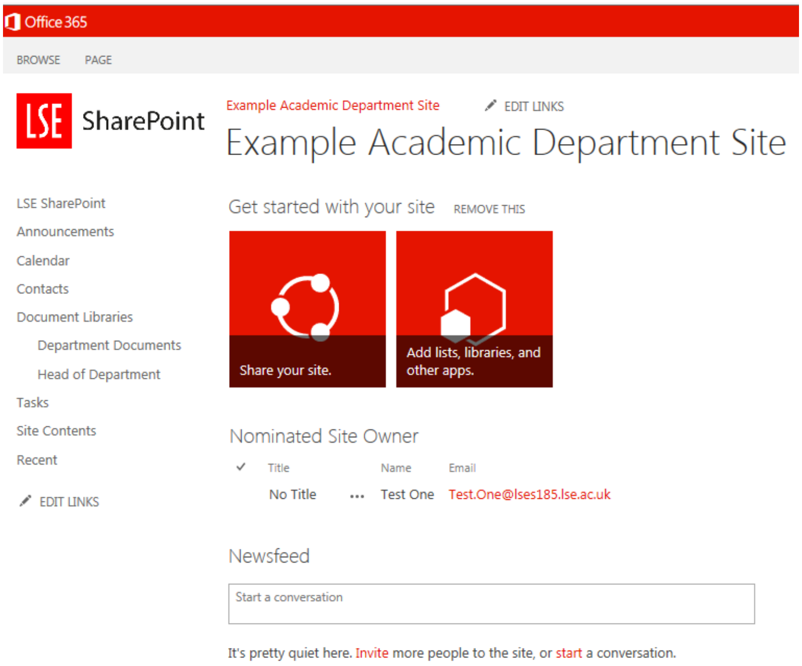
Logging out of SharePoint

To ensure you are fully logged out of SharePoint (Microsoft Office 365) follow the instructions below.

1. Click the drop-down arrow , which is to the right of your user name at the top right hand corner of the SharePoint team site window
2. Click **Sign out**
3. Close your browser



Introduction to your new SharePoint site



What is available - The Home Page

When you get your new SharePoint site, most of the features you need to use will already be there. As you will see from the left navigation menu, you have:

- **Announcements**
- **Calendar**
- **Contacts**
- **Document Libraries – Department Documents & Head of Department**
- **Tasks**
- **Site Contents**

These items are ready to use. To see what these look like, just select the quick link from the left navigation menu. For instance, when you click Calendar the home page will be replaced by the calendar. You will learn more about these features later.

On the home page itself, you will see two tiles:

1. **Share your site.**

And

2. **Add lists, libraries and other apps.**

The tiles are shortcuts to various items you can set-up in SharePoint. The shortcut you are most likely to use is the **Add lists, libraries and other apps**. The Site Owner will set-up the site sharing.

Navigation around your site

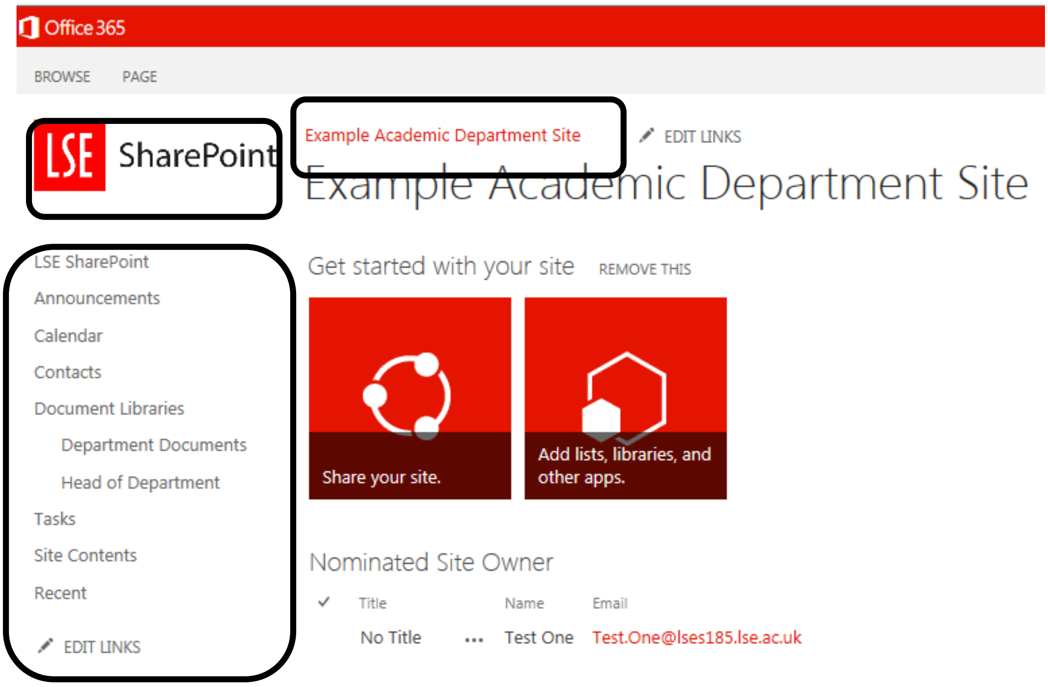
Use the left navigation menu to move through the various screens.

To return to the home page:

1. Click the **LSE logo**, which is in the top left hand corner

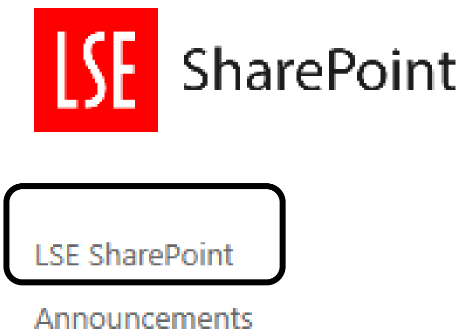
Or

2. Click on **The Name of Your Site**, which is in the quick links at the top of the screen



To return to the LSE SharePoint page:

1. Click **LSE SharePoint**, which is in the left navigation menu

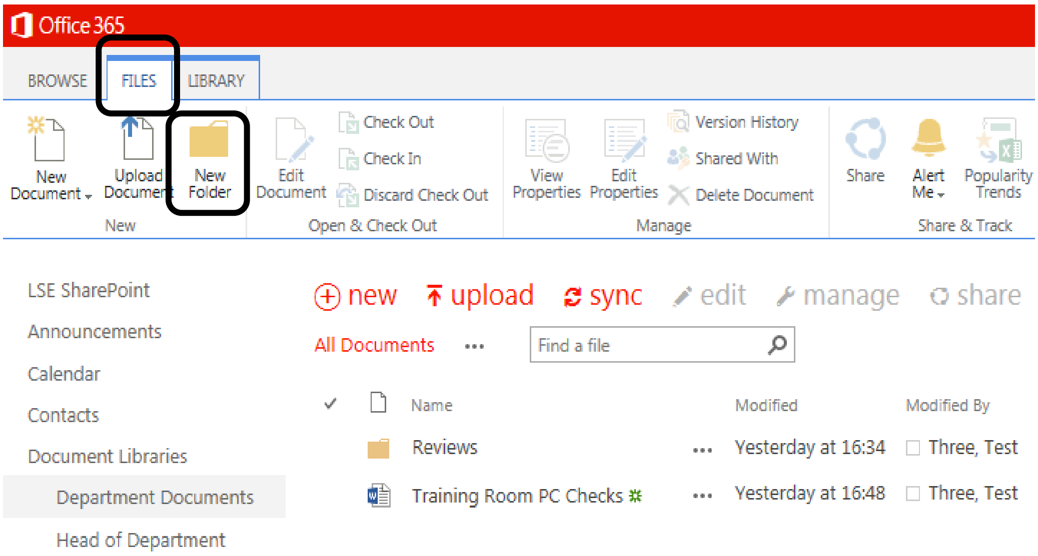


SharePoint Menus

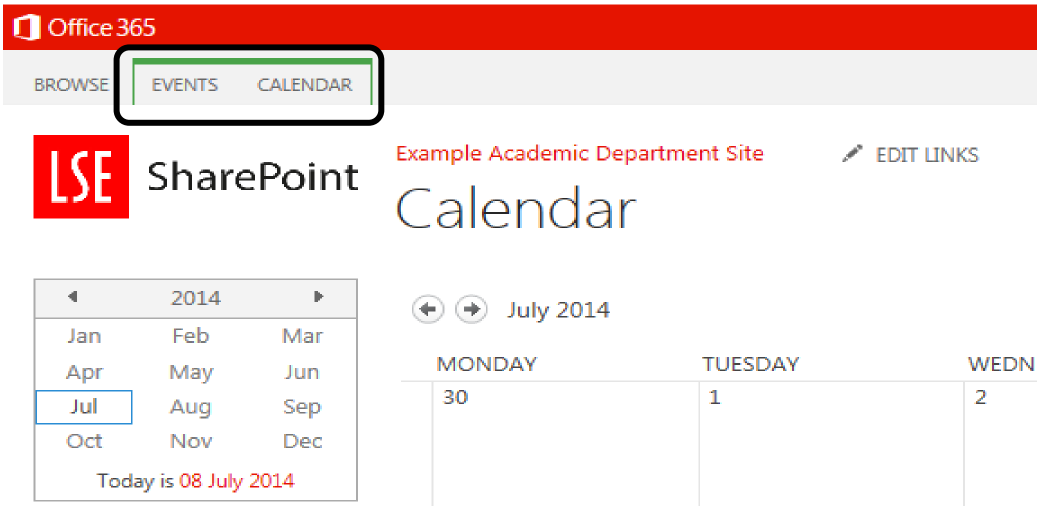
Using the Ribbon

The Ribbon appears at the top of each SharePoint page when a particular Ribbon tab is clicked on. The Ribbon is a menu containing a selection of tasks related to the selected tab. The Ribbon will be hidden from view when you click on the **BROWSE** tab.

1. Select the area you wish to work in from the left navigation menu. In this example a **Document Library**
2. In the ribbon at the top of the screen, click on the **FILES** tab
3. In the **New** group, click on **New Folder**



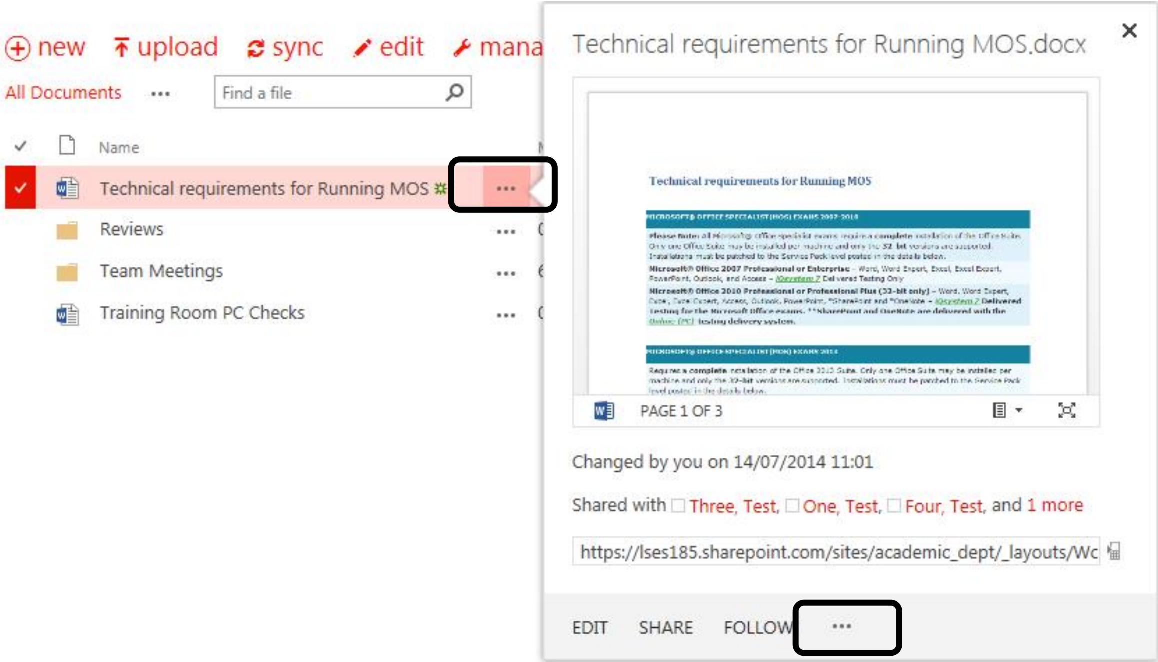
Please note: The Ribbon tabs will change depending on what you have selected in SharePoint. In the example below, from the left navigation menu, **Calendar** is clicked on and the Ribbon tabs now show **EVENTS** and **CALENDAR**.



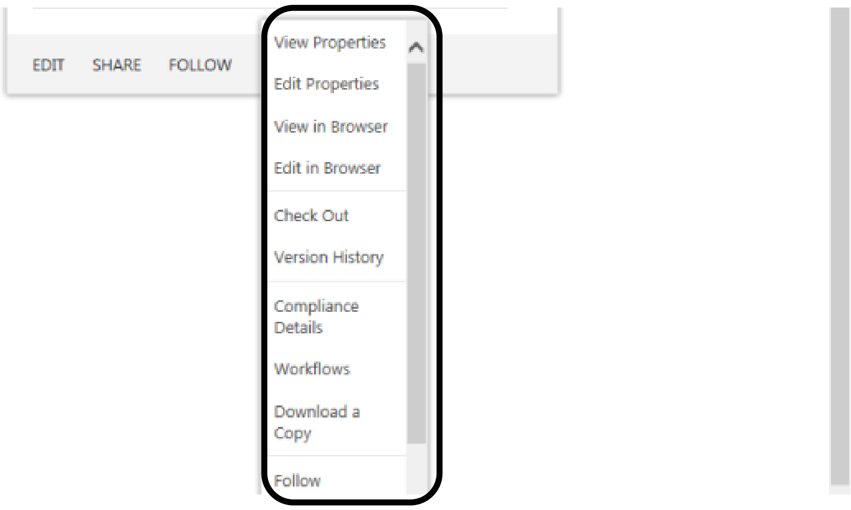
The Ellipse ••• Menu

For most of this guide, you will be shown how to make choices using the Ribbon menu but from time to time you may choose to use the Ellipse ••• menu. Most of the choices here are duplicated in the ribbon but you may prefer to use this route.

You will see the **Ellipse** ••• to the right of any folder or file/document on a SharePoint page. This produces a pop-up menu of information.



Click the **Ellipse** ••• on the pop-up menu for more options

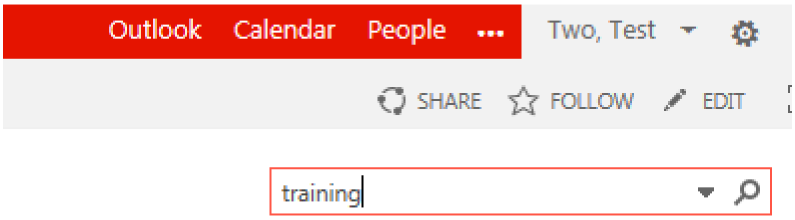


Search for a document or file in SharePoint

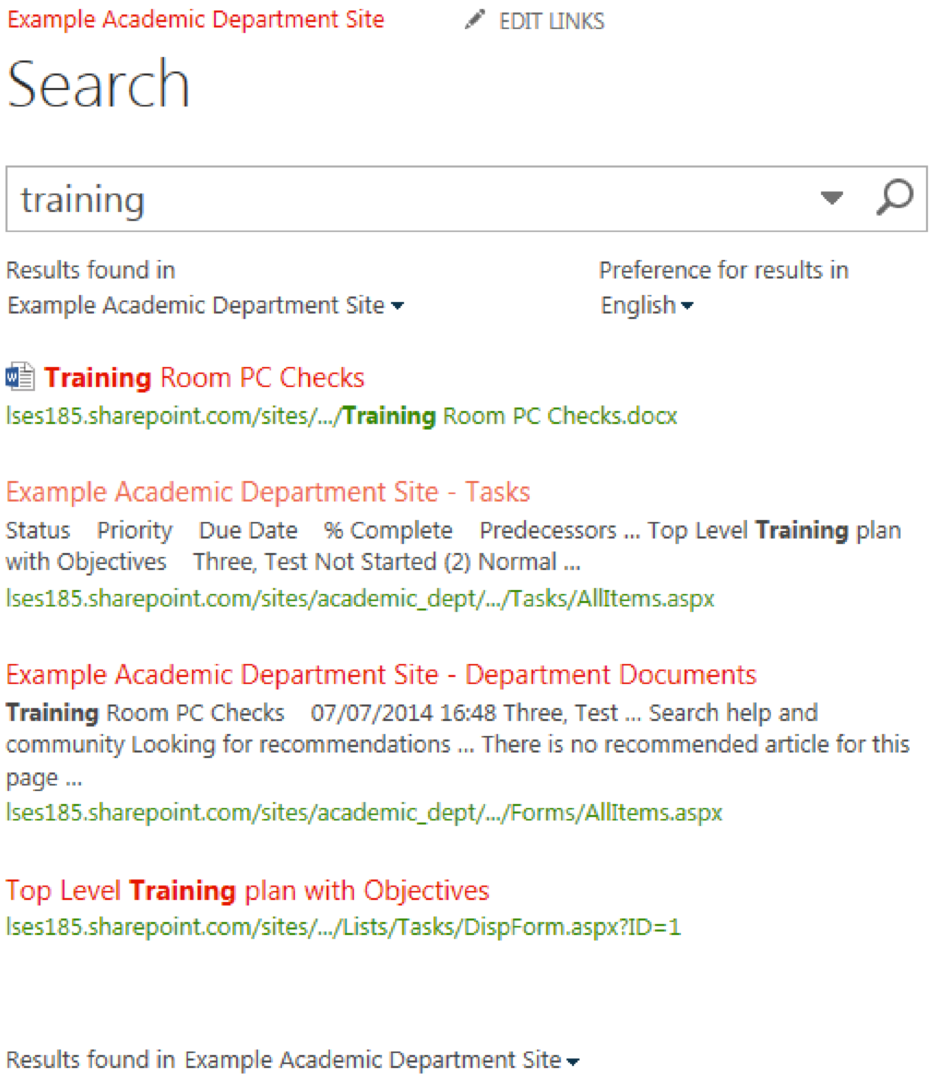
You can search for any document or item in your site easily by its name or part of its name.

To search the entire site:

1. Click on the search box, which is located at the top right of the page
2. Type in your search text to look for any content on the site containing this text
3. Press **Enter** or click on the magnifying glass

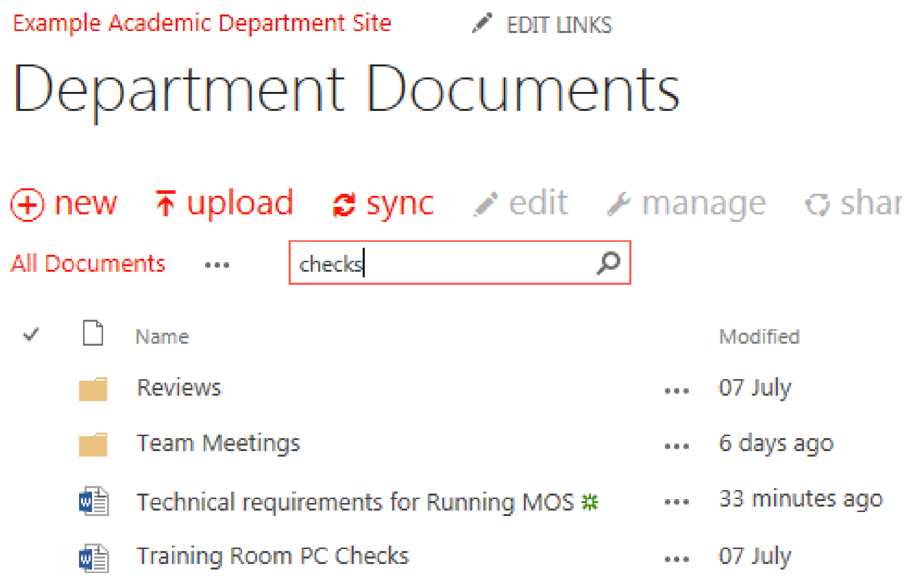


This is an example of the search results.

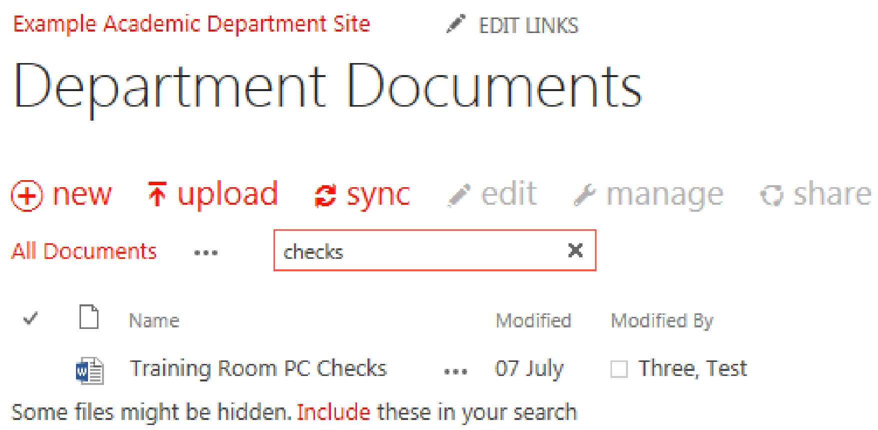


To search the contents of a library or folder:

1. Click on the search box, which is located above the document list
2. Type in your search text in the search box located above the document list
3. Press **Enter** or click on the magnifying glass



The listed content of the library or folder will condense to show only the results as shown below:



To see the full content of the library or folder again:

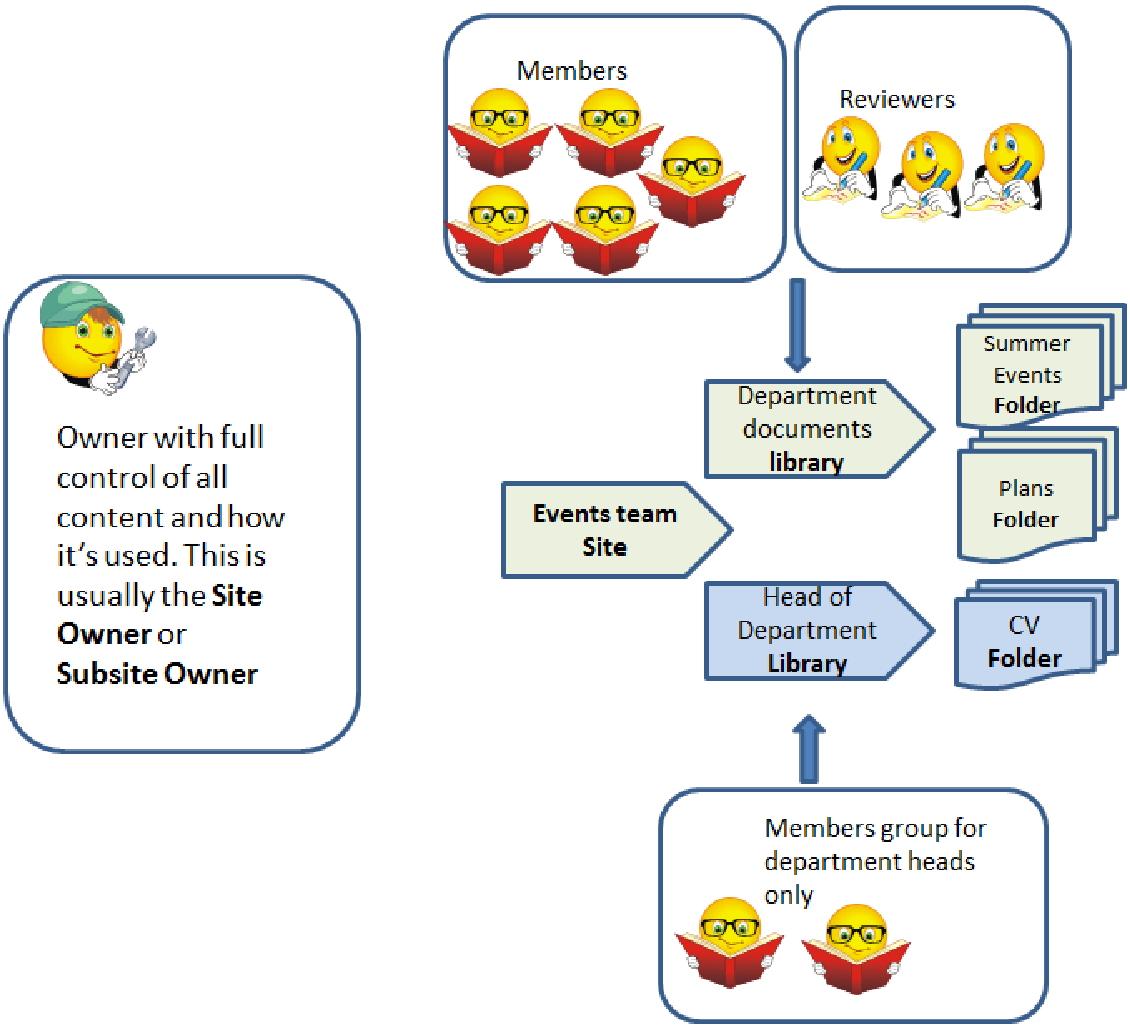
1. Click the ✕ next to the search text

User groups and permissions

As a SharePoint end user, you will be assigned to a particular user group, which will determine how you can use the content of your SharePoint team site. For instance, the group you are assigned to may be able to gain access to most content of your team site or only certain libraries or subsites.

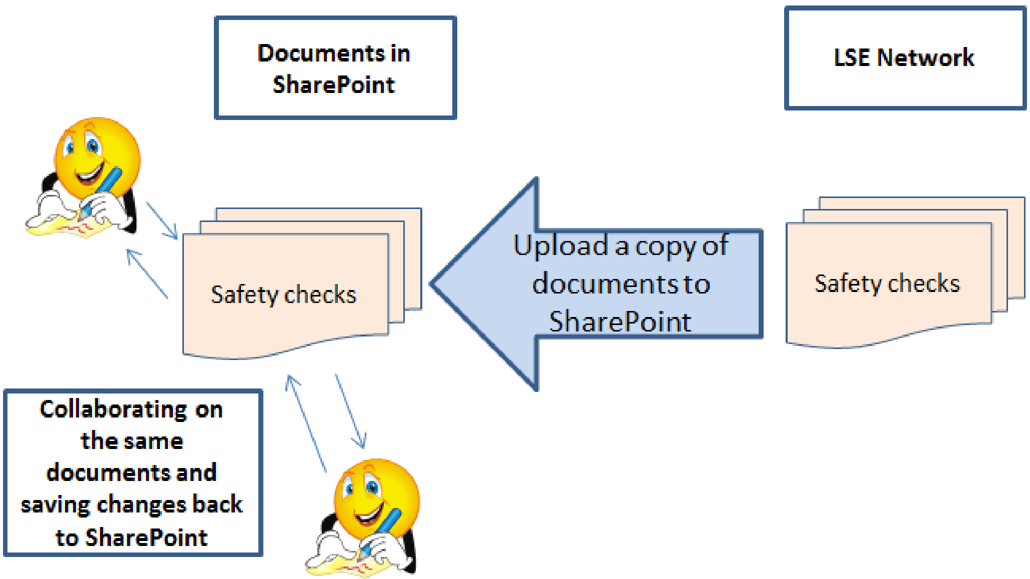
You will be assigned to either the **Reviewer** Group or the **Members** Group. The permissions set on each group will determine what you can do within SharePoint. The default permissions on the groups are set so that **Members** can create and edit content on the site such as documents, libraries and folders. The **Reviewer** group can only read the content of areas they are assigned to.

In the example below, the Site Owner has full control of everything on the site. The **Reviewer** group can only read the content of the Department documents library while the **Members** group can edit the content within it. The department heads Member group can create and edit content of the Head of Department library.

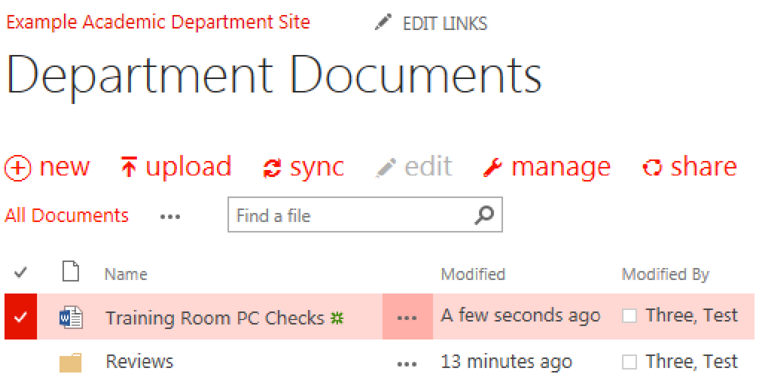


Document management and collaborative working in SharePoint

Documents and files can be uploaded into SharePoint from your Network drive. This will produce a **copy** of the original file or document. Documents stored in SharePoint are there to be used collaboratively with colleagues and for this reason you should continue to use the document in SharePoint and not the original stored on your network.



When you edit a document in SharePoint, the changes will be stored in SharePoint. There will be a record of who made the changes and when the changes were made. In most cases a new version of the document will be automatically created when a change is made, making it possible to step back to previous versions if necessary.



*The **Training Room PC Checks** document shows who last modified it and when.*

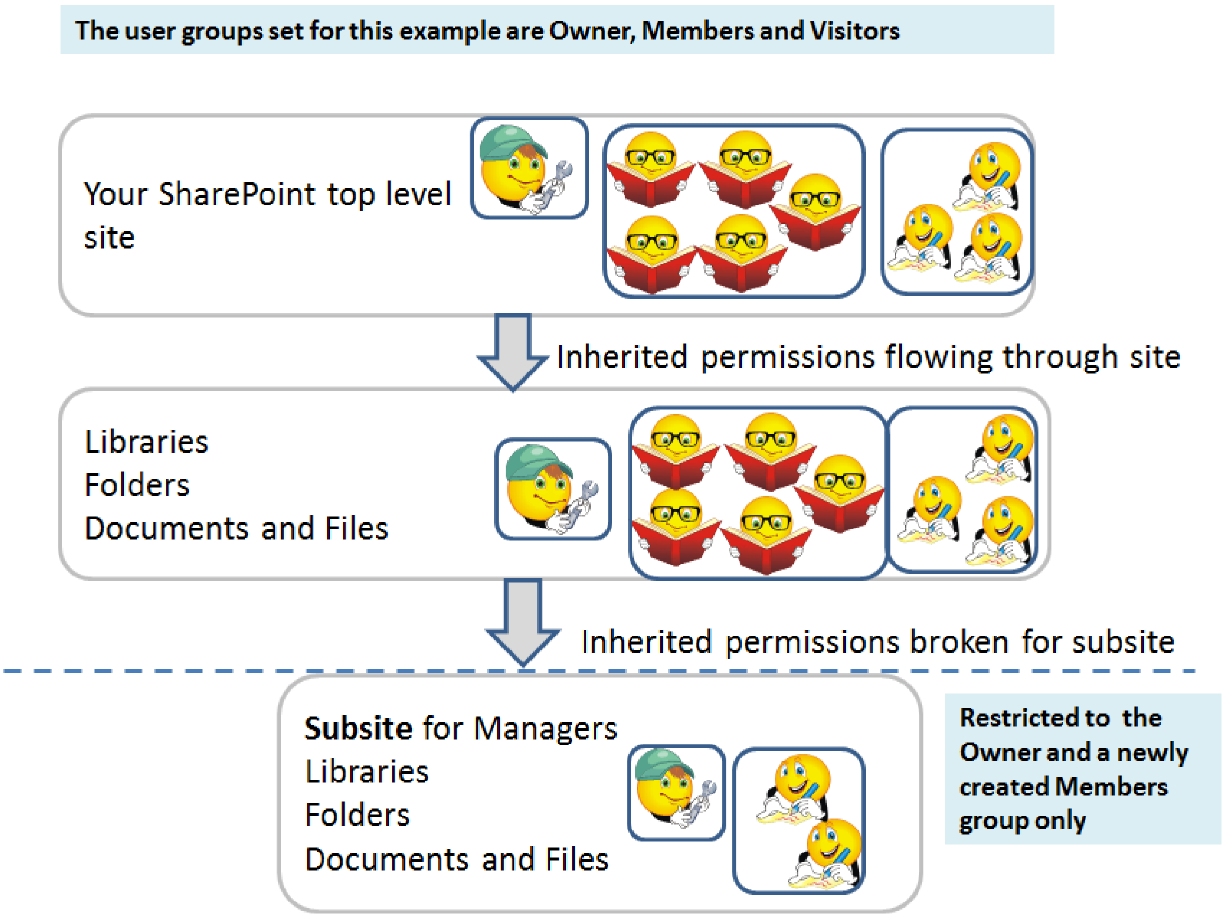
Document management

Before uploading and sharing documents and files in SharePoint it is important to realise who will be automatically sharing these documents. This depends on the permissions inherited from the site or library you are uploading documents to.

Introduction to inherited permissions

Any new document uploaded to SharePoint will have the same permissions (people who can use it) as its parent site or library. As a **Member** user (which most SharePoint end users are), you will not be able to change the permissions inherited from your site or document libraries but you will be able to extend the permissions by requesting to share a document with additional users (see the section on sharing documents).

The image below shows how permissions flow down from the team/department site to all the content below it unless uniquely changed for a library or subsite.



Library and folder structures

Default document libraries

You will find two default libraries ready to start working with.

Department Documents

This library is designed to be used for your general business needs and document collaboration. You can create folders within this library to help organise your work.

Head of Department

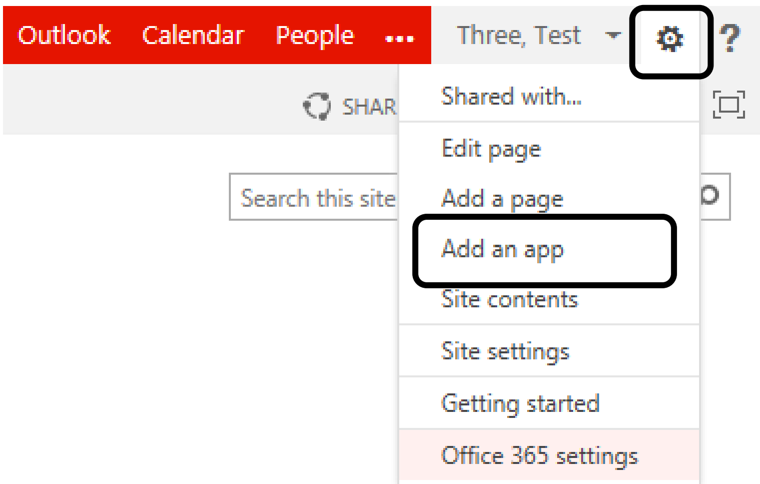
This library has been created for you to use when it is necessary to restrict use of the content. For instance, the Head of Department may have documents that only a restricted number of users would need to have access to. By default, the permissions on this library will be inherited from the site and will not have any restrictions. If this is needed, your Site Owner can break the inheritance and set-up unique users for the library.

Because you have these libraries there is generally no need to create additional libraries. You can start uploading your documents straight away. Go to the **Upload documents** or **Create new documents** section of this manual or click the following links: Upload a document into SharePoint or Create a new document in SharePoint using Office online

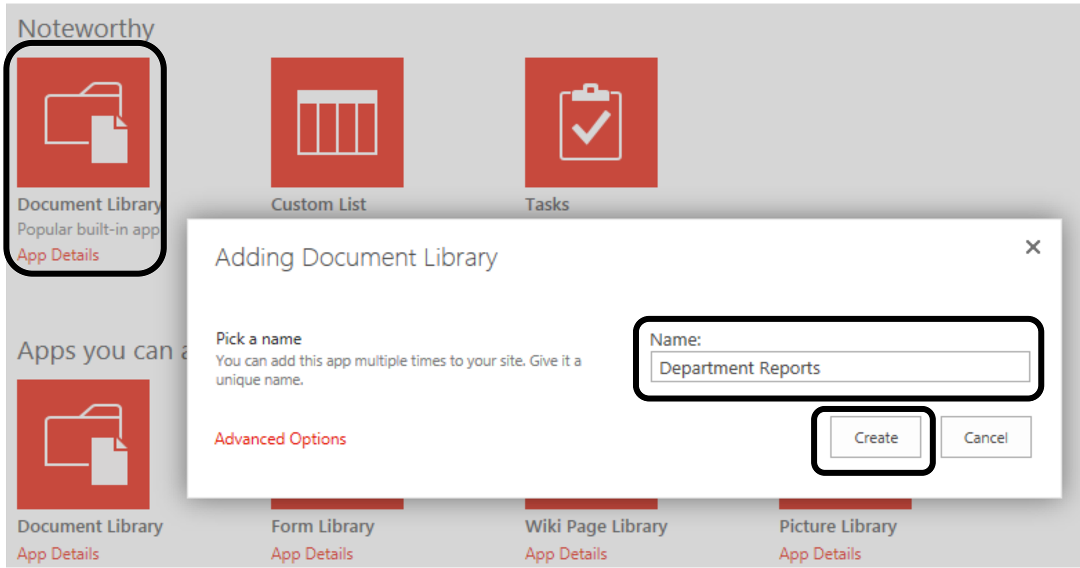
If you need to create additional libraries or folders, the following pages will show you how.

To create a library:

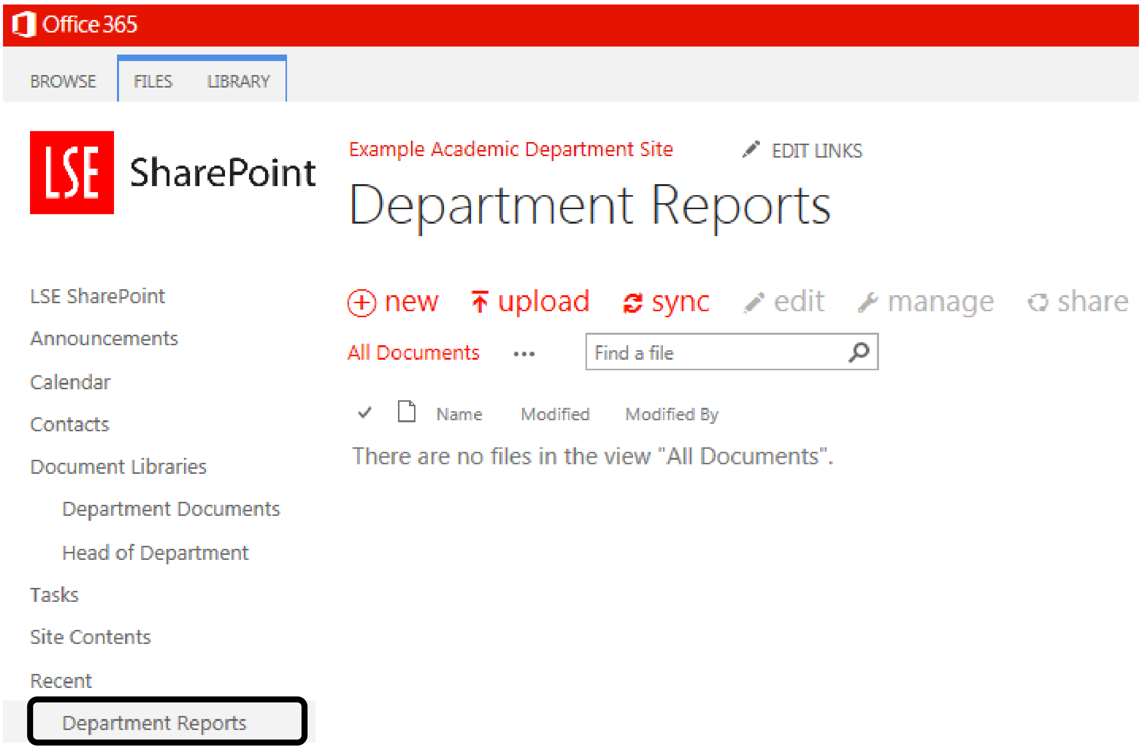
1. Click **Settings**
2. Click **Add an app** from the drop down menu



3. Click **Document Library**
4. Create a name for your library in the **Adding Document Library** dialogue box
5. Click **Create**



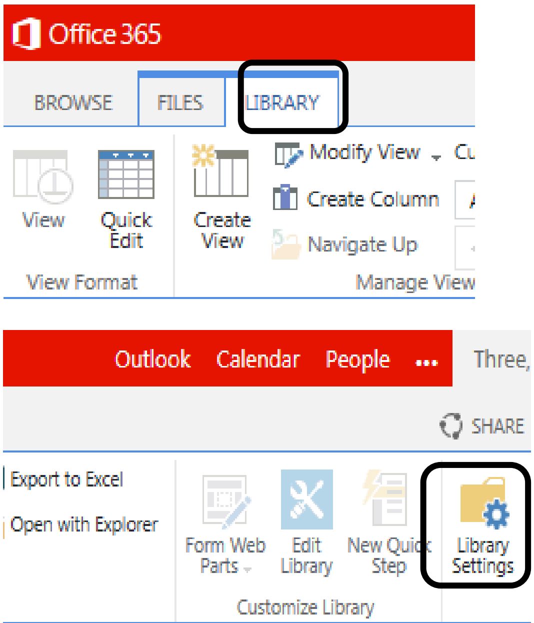
You will now see your new library in the left hand side navigation menu.



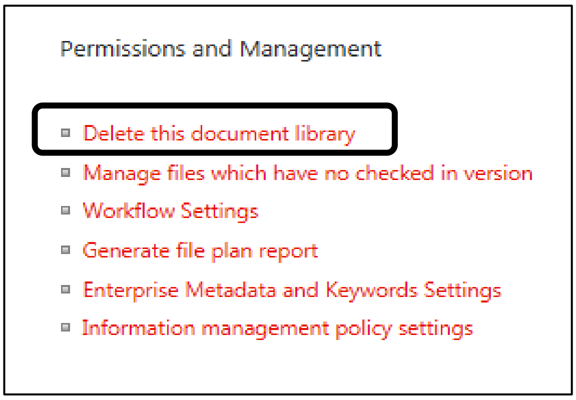
To remove a SharePoint library:

Please note: When you delete a library, you will also be deleting all the documents within it.

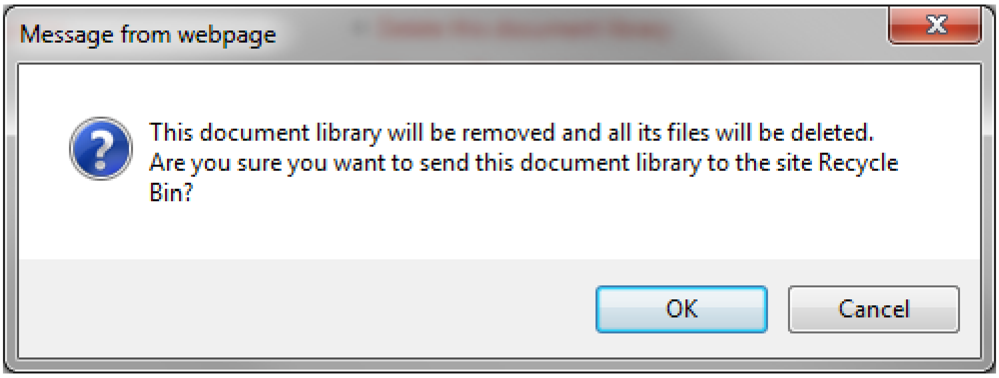
1. Open the library you want to delete
2. Click the **LIBRARY** tab
3. In the **Customize Library** group, click **Library Settings**



4. Click **Delete this document library**, which is under **Permissions and Management**



The dialogue below will act as a warning



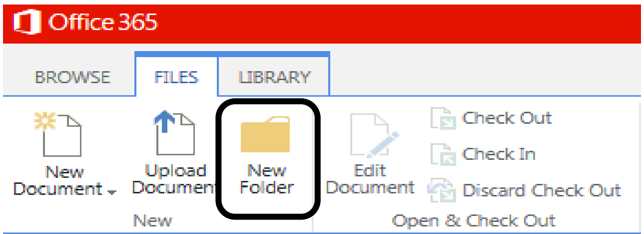
5. Click **OK** to complete the action

Create a folder

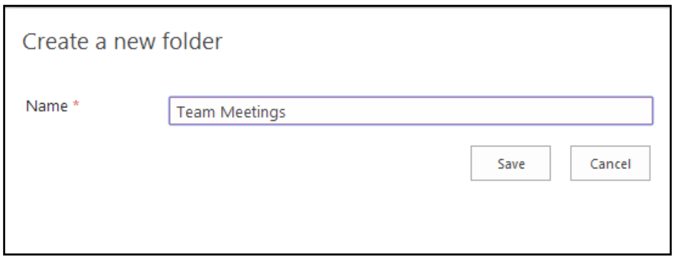
Folders can help to organise documents in a library and will help the team to find the documents they need to work on. Remember that the folder you create will inherit the permissions from its library. If you need changes to the permissions (who can see and edit the documents within the folder), please speak to your Site Owner.

To create a folder:

1. Open the library where you want to create a folder
2. Click the **FILES** tab
3. In the **New** group, click **New Folder**



4. Type the name of the folder in the **Name** box
5. Click **Save**



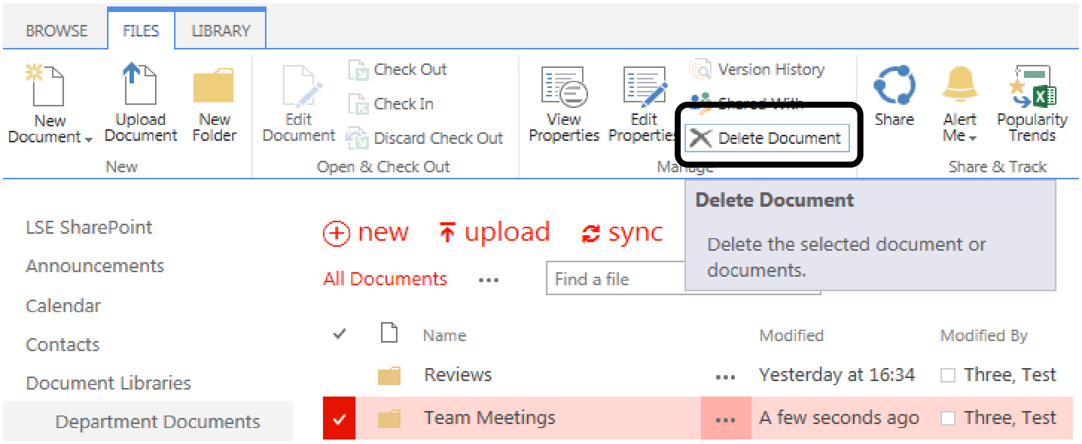
You will now see your new folder listed in the Library.

Delete a Folder

Please note: When you delete a folder, you will also be deleting all the documents within it.

To delete a folder:

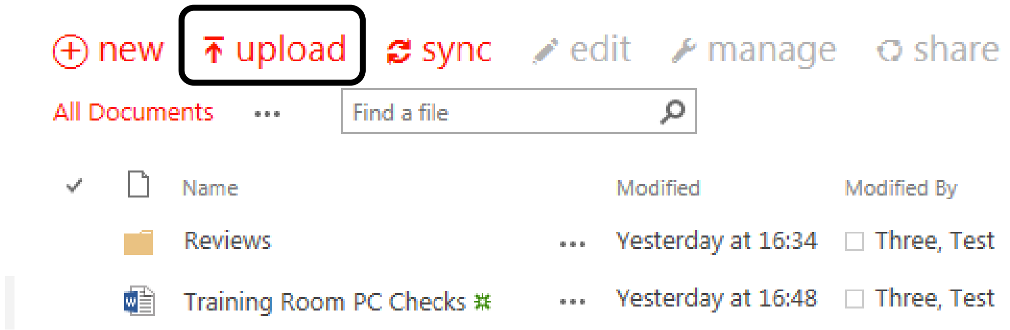
1. Open the library containing the folder
2. Tick against the folder you want to delete
3. Click the **FILES** tab
4. In the Manage group, click **Delete Document**
5. Click **OK**



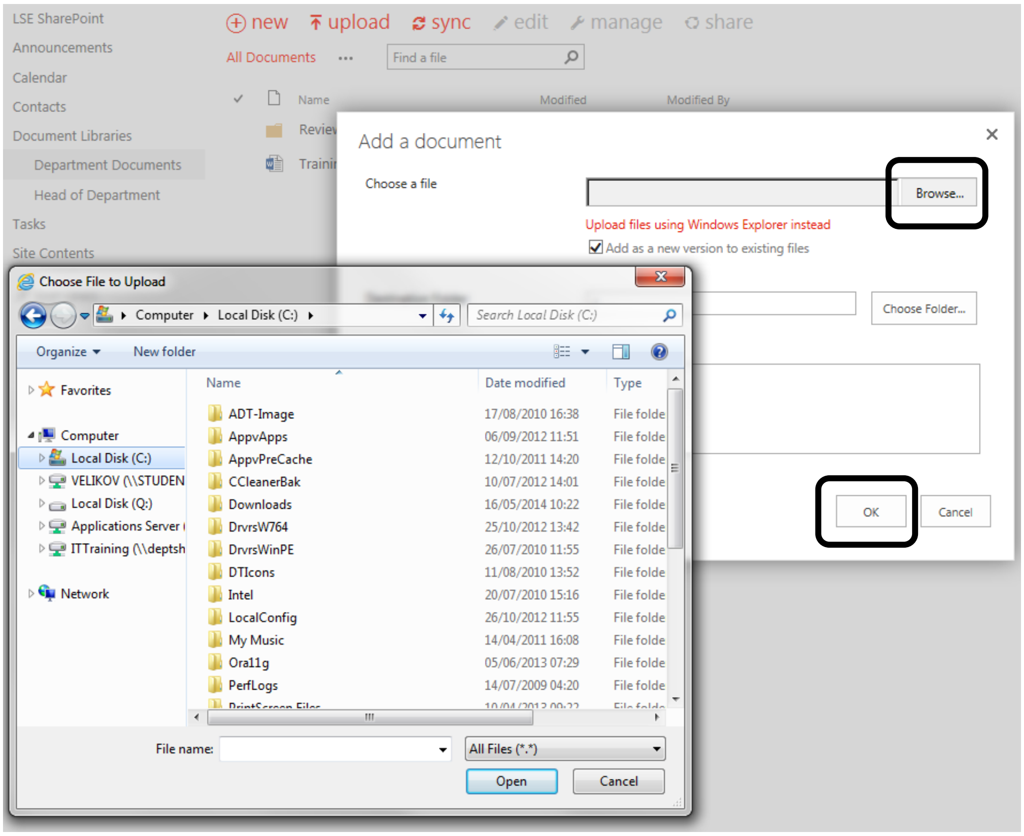
Upload a document into SharePoint

To upload a document into SharePoint:

1. Click on the library or folder to upload the document to
2. Click on **upload** above the document list



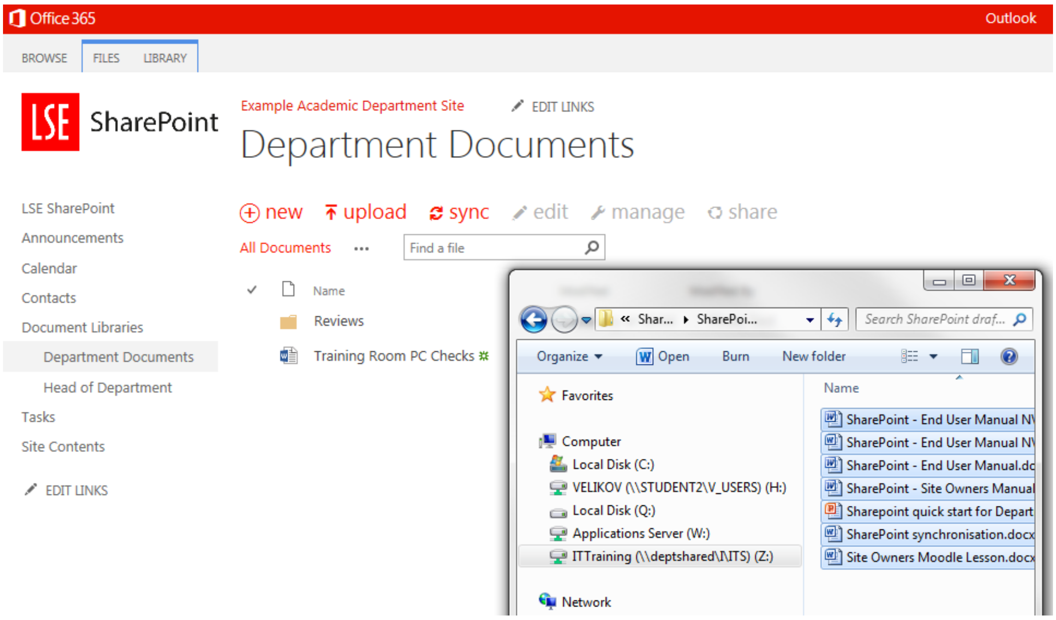
3. Click **Browse…**
4. Select the file or document to upload from Windows Explorer
5. Click **Open**
6. Click **OK**



Your file or document will now be copied to SharePoint.

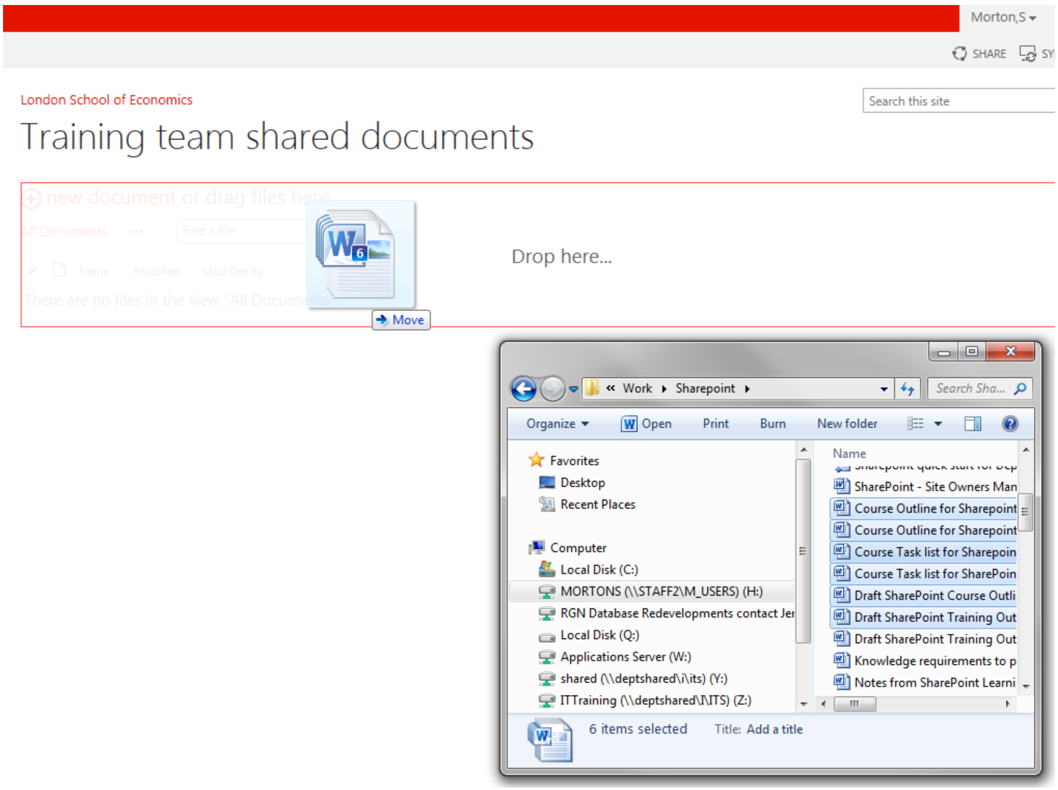
To upload multiple documents to SharePoint:

1. Open your folder in SharePoint and open **Windows Explorer**
2. In **Windows Explorer**, navigate to the group of files you wish to upload to SharePoint and select them



3. Drag the files from **Windows explorer** to SharePoint

   *A red box appears around the area where it says **Drop here** to drop the files into. Once you have dropped the files, they will upload into your SharePoint Folder.*

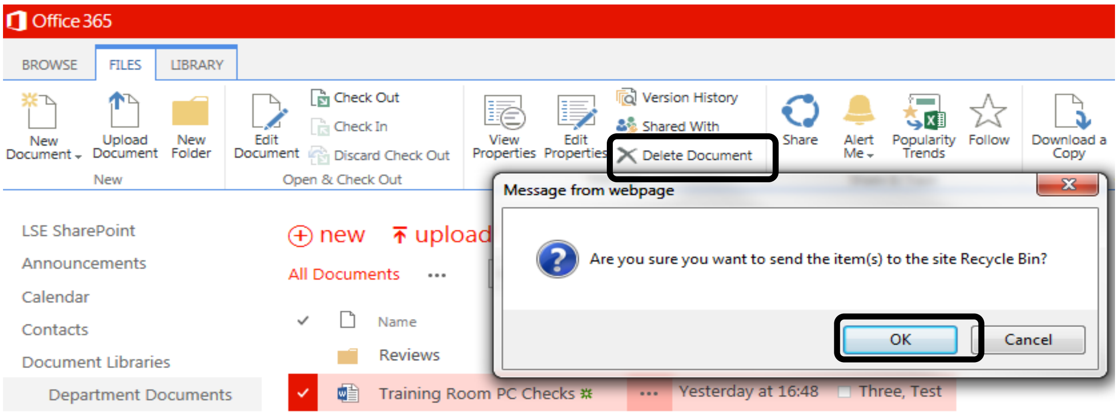


Remove a document in SharePoint

Please note that if a document is deleted from SharePoint or placed in a different library or folder, any shared links sent to someone outside of SharePoint will no longer work. **If a shared document is moved to a new location, a new share invitation should be created so that a new link can be used.**

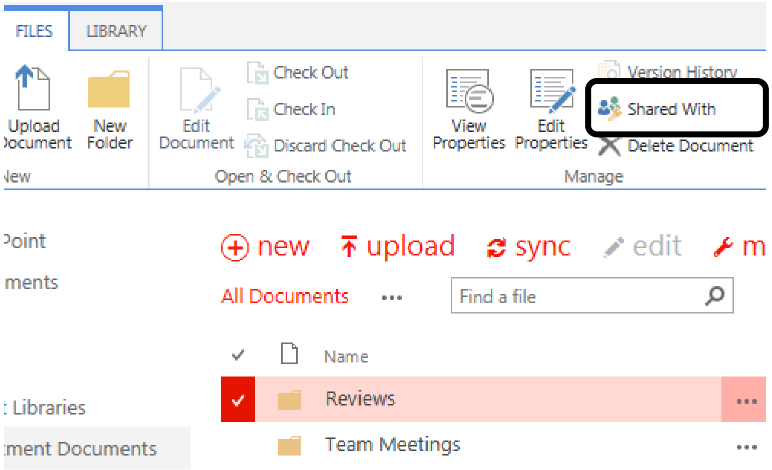
To remove a document in SharePoint:

1. Open the document library or folder
2. Click on ✓ in front of the chosen document
3. Click the **FILES** tab
4. In the **Manage** group, click **Delete Document** or press **Delete** on your keyboard
5. Click **OK** to confirm deletion

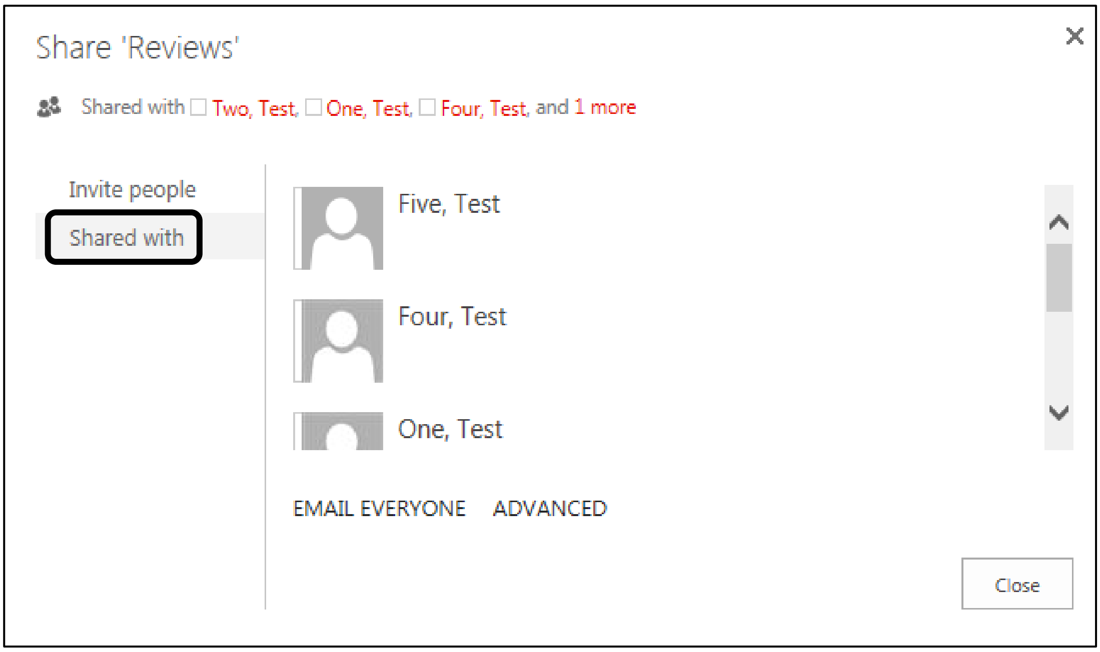


To see who has access to your documents:

1. Open the document library or folder
2. Click on ✓ in front of the chosen document or folder
3. Click on the **FILES** tab
4. In the **Manage** group, click **Shared With**



5.



You will now be able to scroll through the list of users and groups or users who can see the contents of the selected folder.

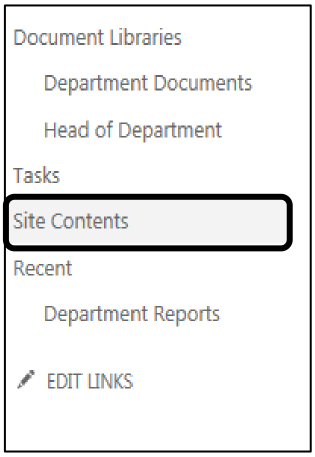
6. Click **Close** to finish

How to restore a deleted file in SharePoint

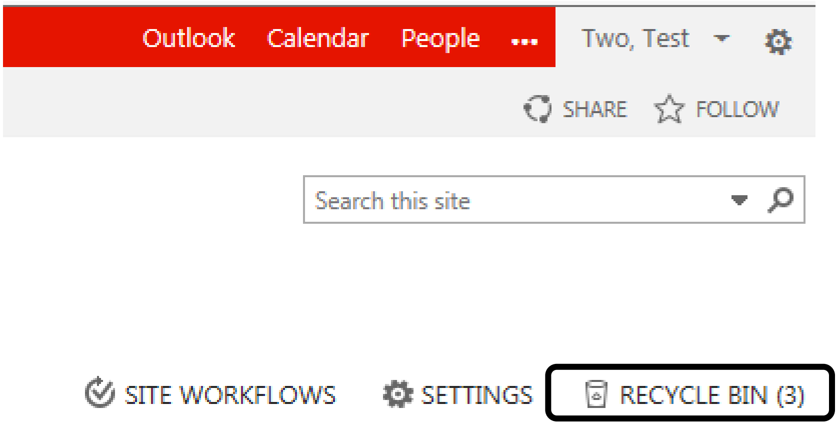
It is possible to recover your deleted documents from the SharePoint recycle bin. Follow the steps below to find out how to do this.

To restore a deleted file in SharePoint:

1. Click **Site Contents** from the left navigation menu

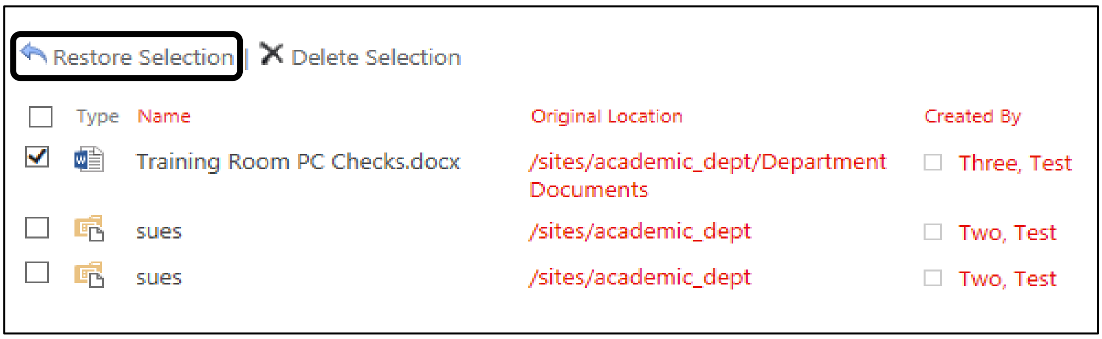


2. Click **RECYCLE BIN** located at the top right hand corner of the page



3. Tick next to the document you wish to restore to its original position in SharePoint

4. Click **Restore Selection** and **OK**

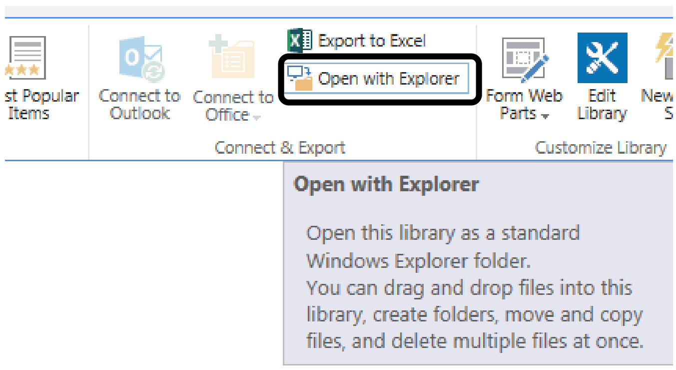


Move a folder in SharePoint

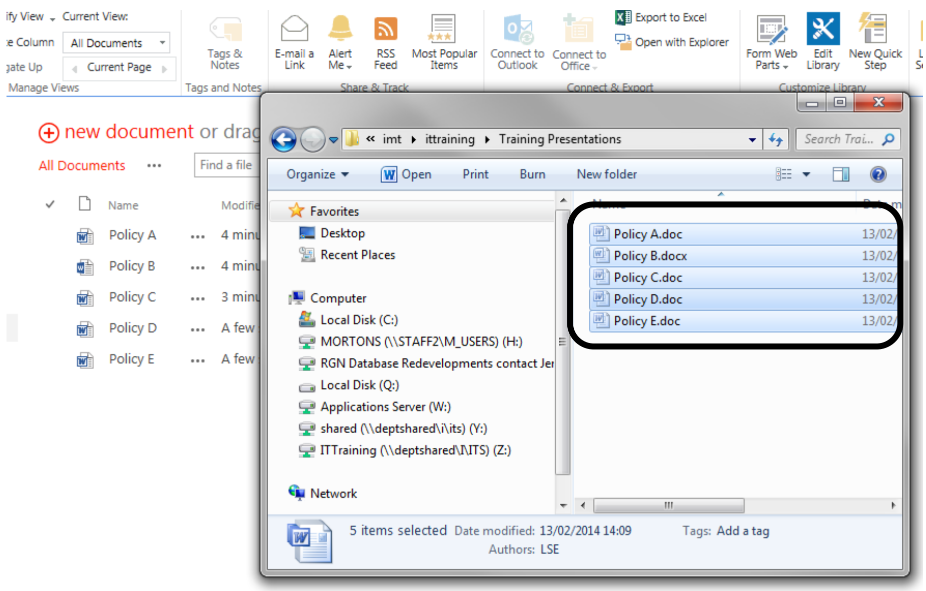
The process to move a folder in SharePoint is to create a new folder. Copy all the files and documents from the original folder to the new folder and delete the original folder. The steps below show the quickest way to do this.

To move a folder in SharePoint:

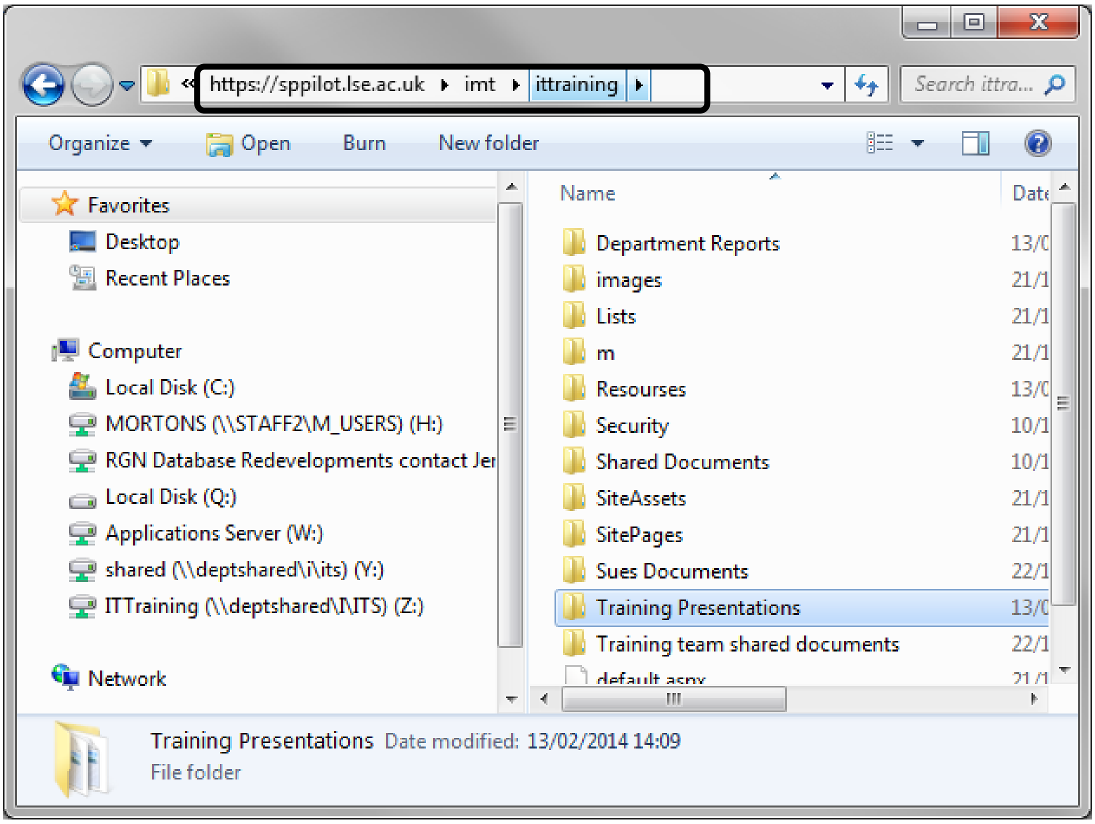
1. Open the library where you want your new folder to go
2. Create a new folder
3. Open the original (source) folder
4. Click the **LIBRARY** tab
5. In the **Connect & Export** group, click **Open with Explorer**



6. Select the documents/files you wish to move from **Windows Explorer**
7. Position your mouse cursor over the selected documents/files
8. Click the right mouse button to see the **context menu**
9. Click **Copy**

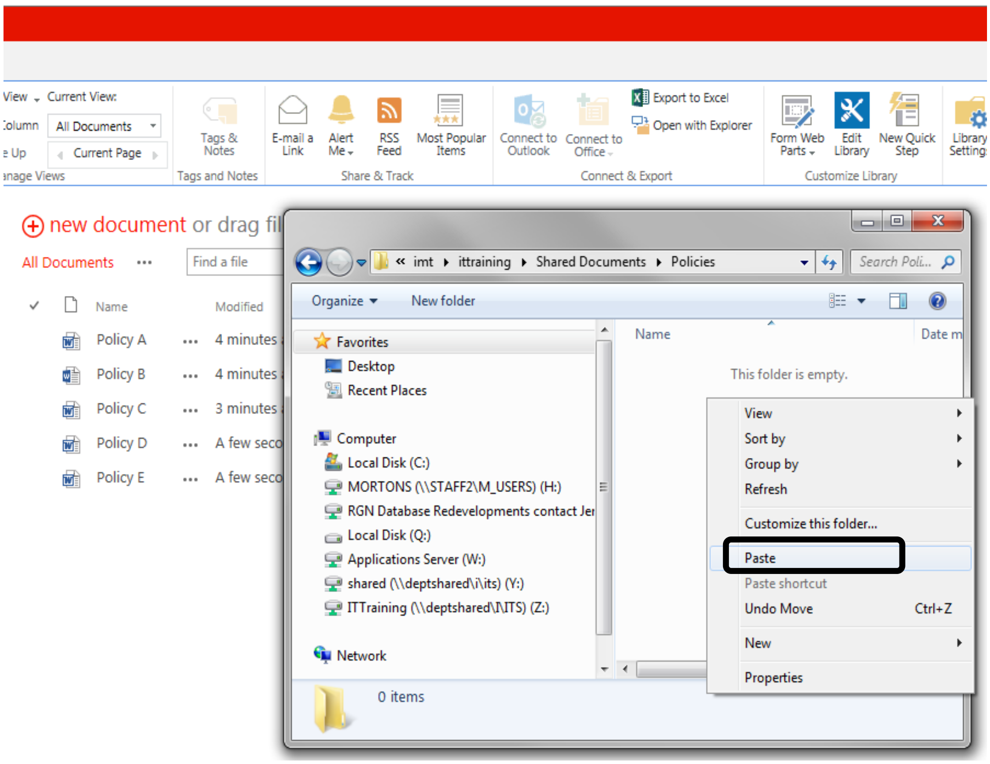


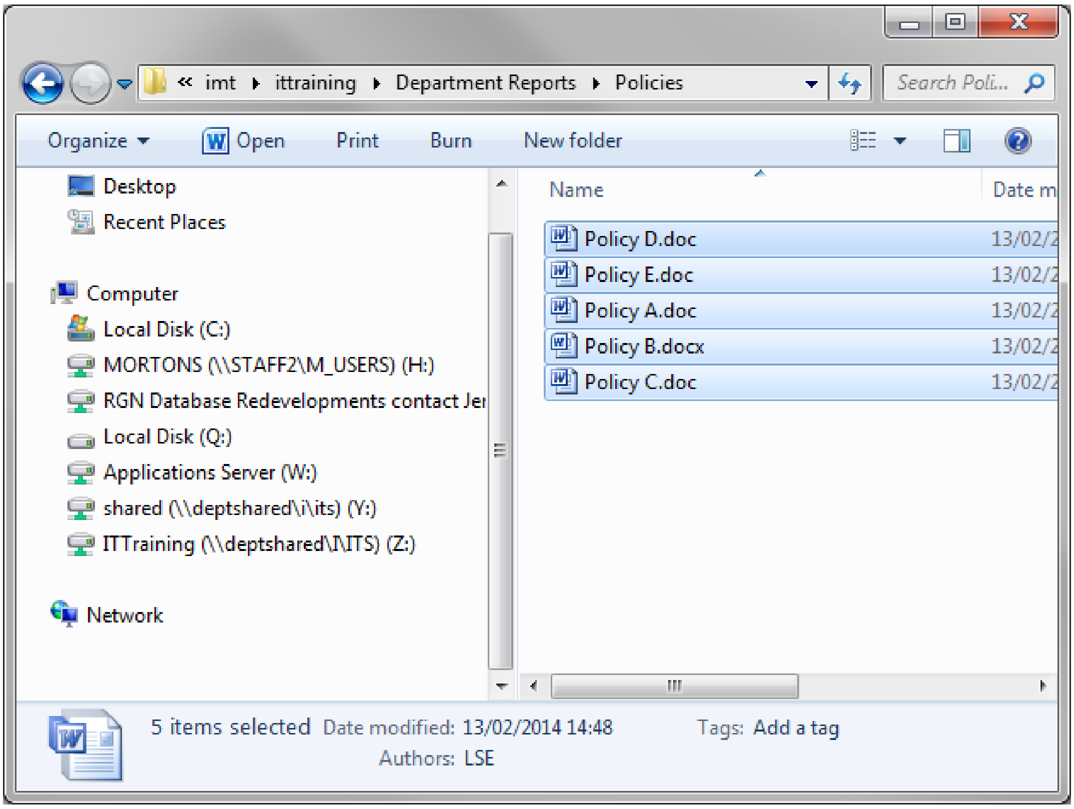
10. Click your **Site Name** from the **Address Bar** at the top of **Windows Explorer**



You will see all the SharePoint folders and libraries.

11. Open the new destination folder in **Windows Explorer**
12. Position your mouse cursor over the larger white area
13. Click the right mouse button to see the **context menu**
14. Click **Paste**





The files from the original folder are now transferred to the new destination folder. You can now delete the original folder. See the section on Deleting a Folder in this manual.

Move documents between folders

To move documents between existing folders:

1. Open the folder where you want your documents to go or create a new folder
2. Follow steps **3-14** above

The documents from the original folder are now transferred to the new destination folder. You can now delete the original documents. See the section on Removing a Document in this manual.

Collaborative working

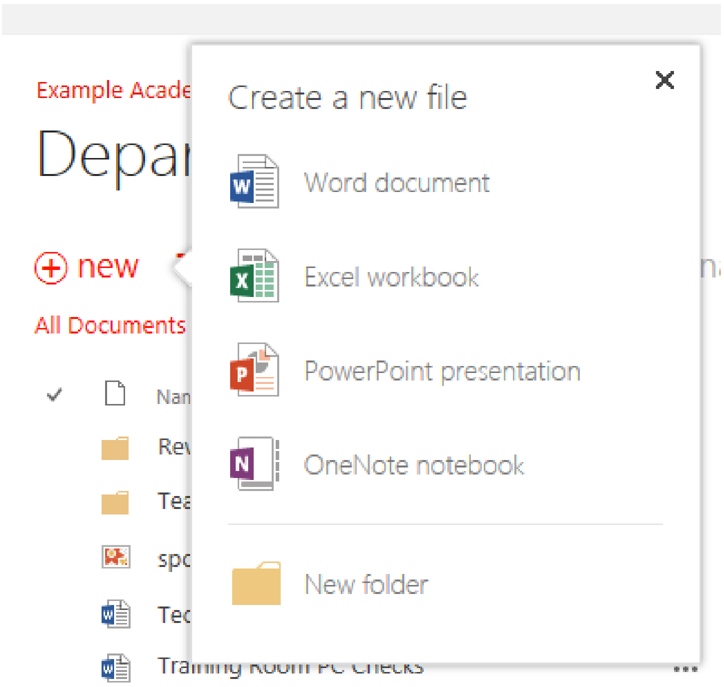
There are many benefits to working collaboratively on a document stored in SharePoint. As you make changes, a record will be kept of who created and modified the document and when this happened. It is also possible to retrieve older versions of the worked document if necessary. There is a section on versioning in this book where you can find out more. It is also possible for more than one person to work on a document at the same time or if that is not desirable, a document can be locked to one person for editing until they unlock it again.

To work collaboratively on a file on documents in SharePoint, you will either create a new document in SharePoint or open an existing file or document. The following steps will guide you through this process.

Create a new document in SharePoint using Office Online

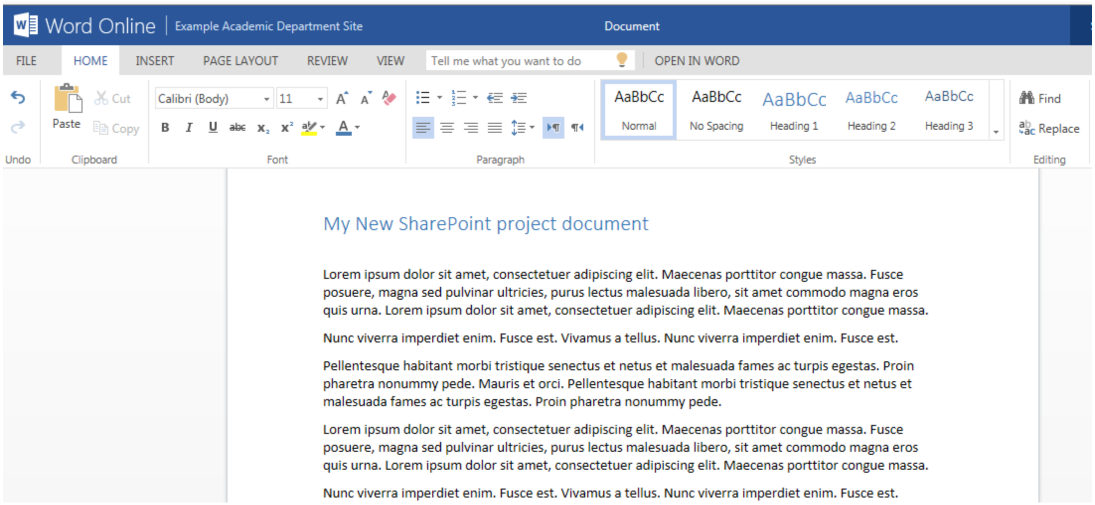
To create a new document using Office Online:

1. Open the library or folder where you wish to save the new document
2. Click **+ new**



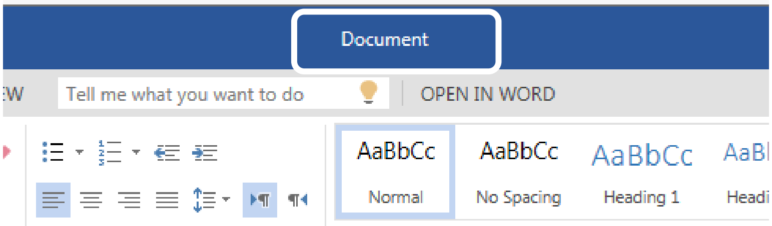
3. Click **Word document** to create a new document

A new word document will open in Office Online. Create your document using the usual Word functionality.

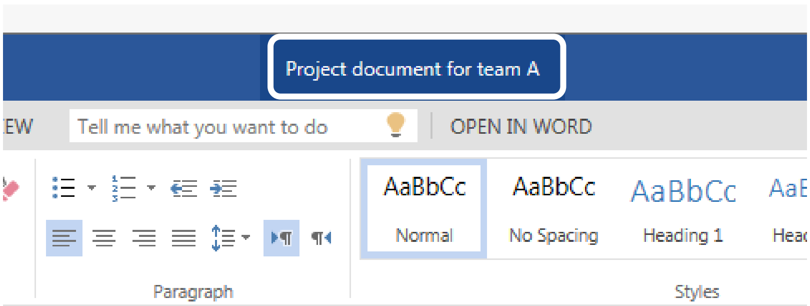


To rename your new document using Office Online:

1. In the title bar, click into the document name



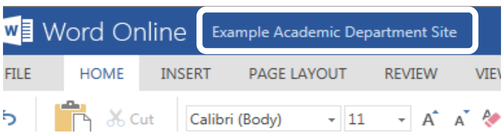
2. Type the document name



The document and its content is automatically saved to SharePoint.

To return to the team site:

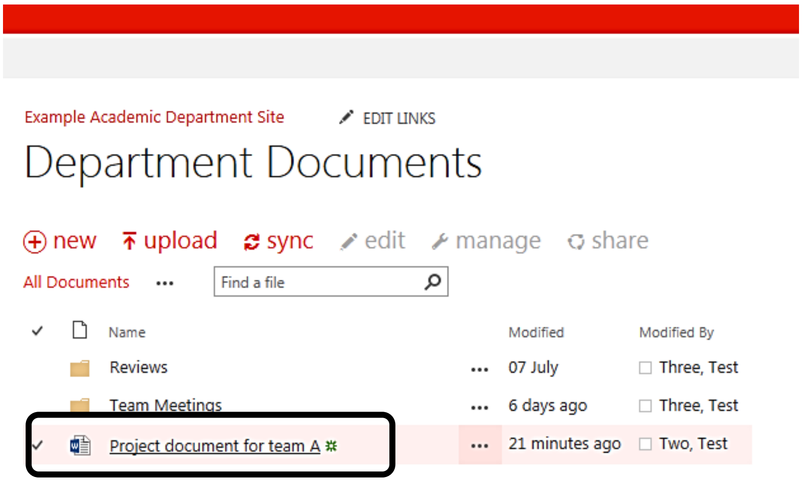
1. In the title bar, click the site name



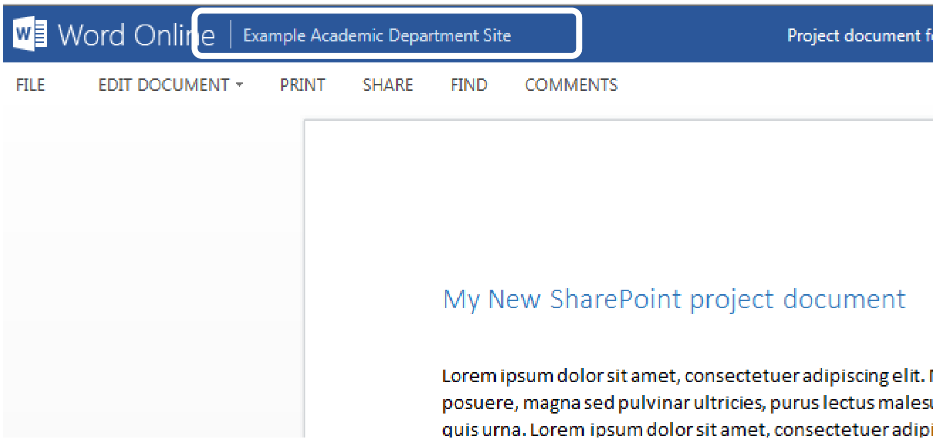
Open and close a document or file in SharePoint

To open and close a file:

1. Open the document library where the file is stored, for example **Department Documents**
2. Hover over the **Name of the Document** until an underscore appears
3. Click on the **Document Name**



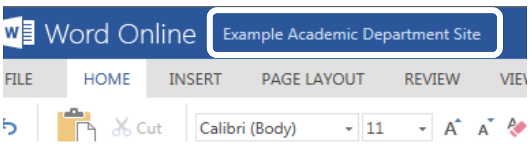
The document will open in Word online.



4. Once you have reviewed the content, close the document by returning to your team site.

To return to the team site:

1. In the title bar, click the site name

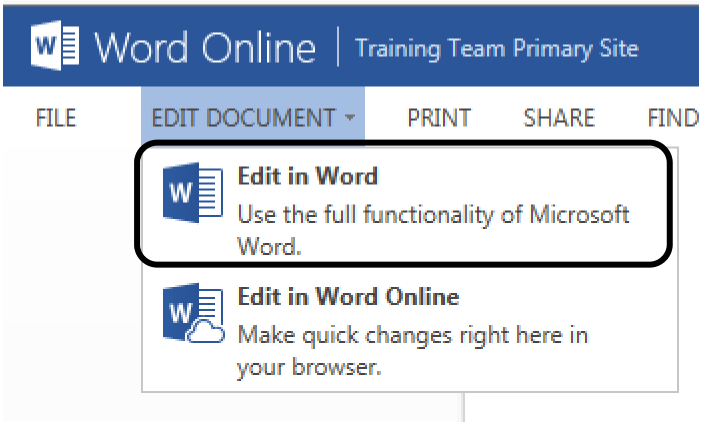


Edit a document in SharePoint and work collaboratively

When editing a shared document in SharePoint, you can choose to edit online or in Word from your PC or laptop. It is best to edit using Word as you will have the full functionality in Word. If you do not have Word installed on your PC you will need to edit your document online.

To edit your document in Word:

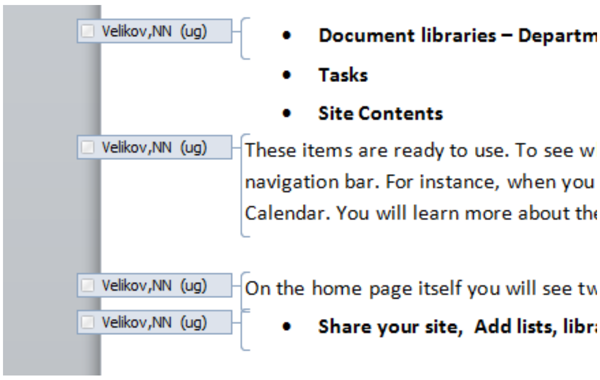
1. Open the document you wish to edit
2. Click **Edit Document**
3. Click **Edit in Word**



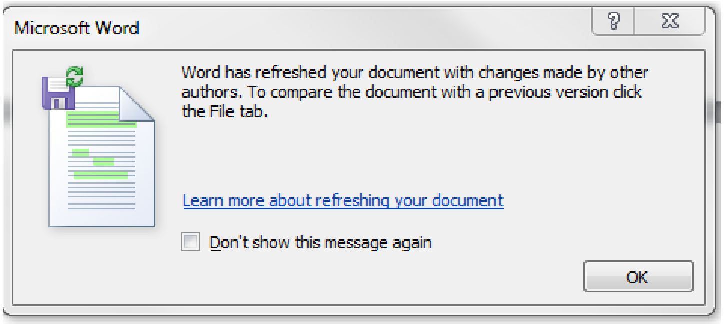
Your document will now open using Word from your PC or laptop. All changes are saved back to SharePoint when you save the document.

If other users are editing the document at the same time, you will see the other users listed in the Status bar at the bottom of the screen. Hover the mouse over the button to see the user details.

When you first open a document, which is being edited by someone else, and those changes haven't been saved, the areas the other user has been working on will be marked with their name in front of it. See below:



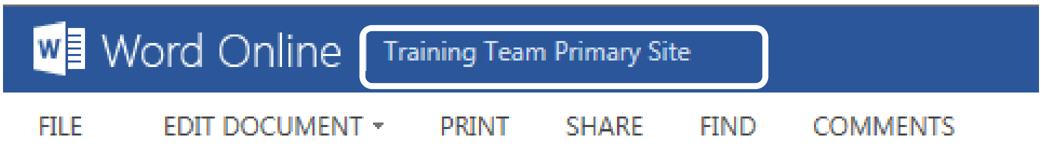
To view the changes they have made while you are in edit mode, save the document. This has the effect of refreshing the document. When the refresh is happening, you will see a pop-up box alerting you that this is what is happening. See below:



4. Make your changes and save your document in the usual way. *The changes will automatically save to SharePoint and be merged with any changes made by your colleagues.*

5. Close your document. *When you return to SharePoint you will see the older online version still showing.*

6. Click on your **Site Name** in the title bar to navigate away from the document

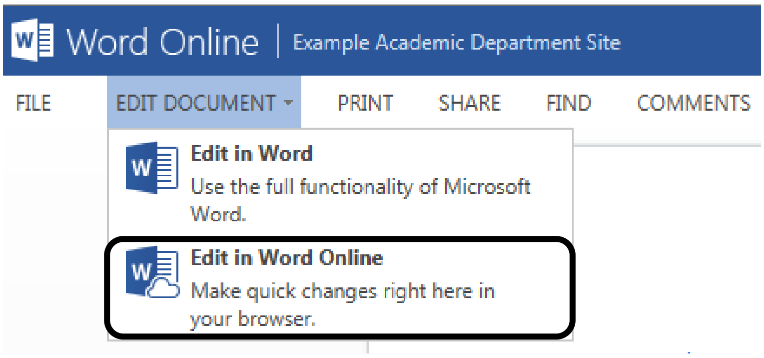


Edit Online

Use this option if you do not have Word or Microsoft Office installed on your PC or laptop.

To edit your document online:

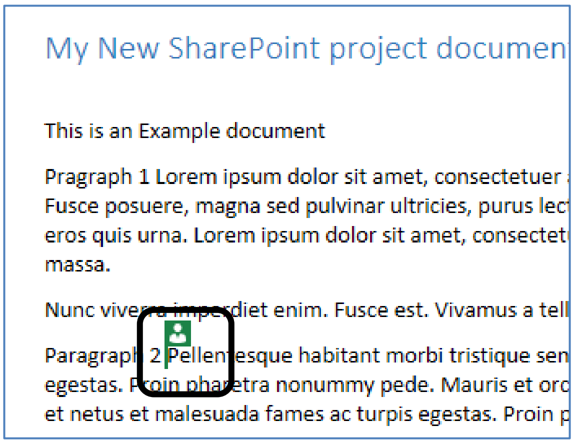
1. Open the document you wish to edit
2. Click **Edit Document**
3. Click **Edit in Word Online**



Word online will open again in edit mode and you can make your changes.

Please note: The layout you work with in edit mode is not true to your original document layout, so it may appear that your text no longer fits to the page or your tables have changed. Ignore what you see and concentrate on making your text changes. The layout will be restored when you view your document again after editing.

If someone else also has the document open, you will see a tag in the document where the other user is working. There will be different colours for different workers. If you hover the mouse over the tag, the name of the user will be displayed.



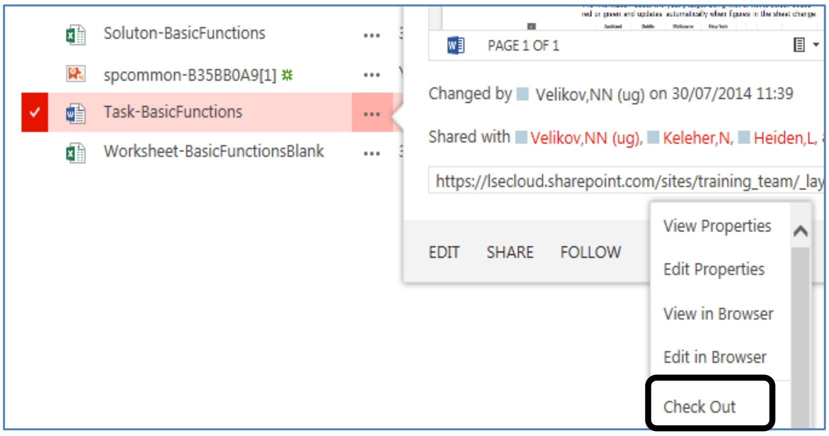
4. Click on your **Site Name** in the title bar to close the document. *This will save your changes automatically.*

Checking documents in and out of SharePoint

The difference between **Checking** a document **In** or **Out** of SharePoint and simply opening the document and making changes, is that the **Checked Out** document is removed from use by any other user. This will allow you to work on the document in isolation until you have finished your changes. Other users will see it is checked out to you and can view the document but cannot make changes to it. When you have finished, you can **Check In** the document back to SharePoint for other uses to work on it.

To check out a document in SharePoint:

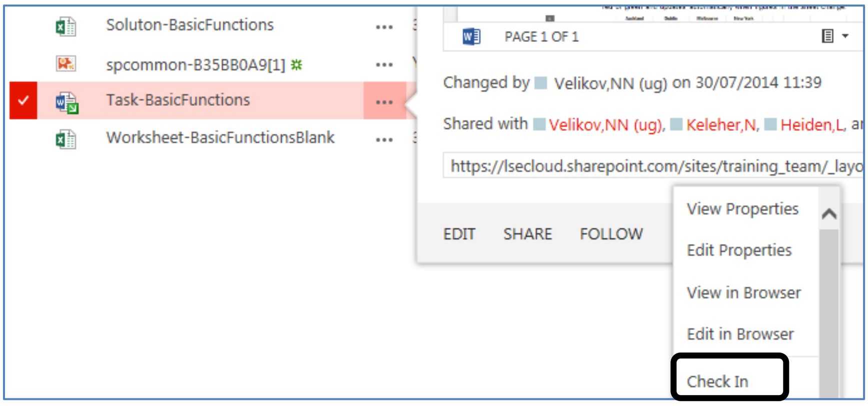
1. Click the **Ellipse** ••• to the right of the file you wish to check out
2. Click the **Ellipse** ••• on the pop-up menu for more options
3. Click **Check Out**



The document is now reserved to you for editing. There is a green tag in front of the document name, which indicates that the document is checked out. Hover over the tag to see who has checked it out.

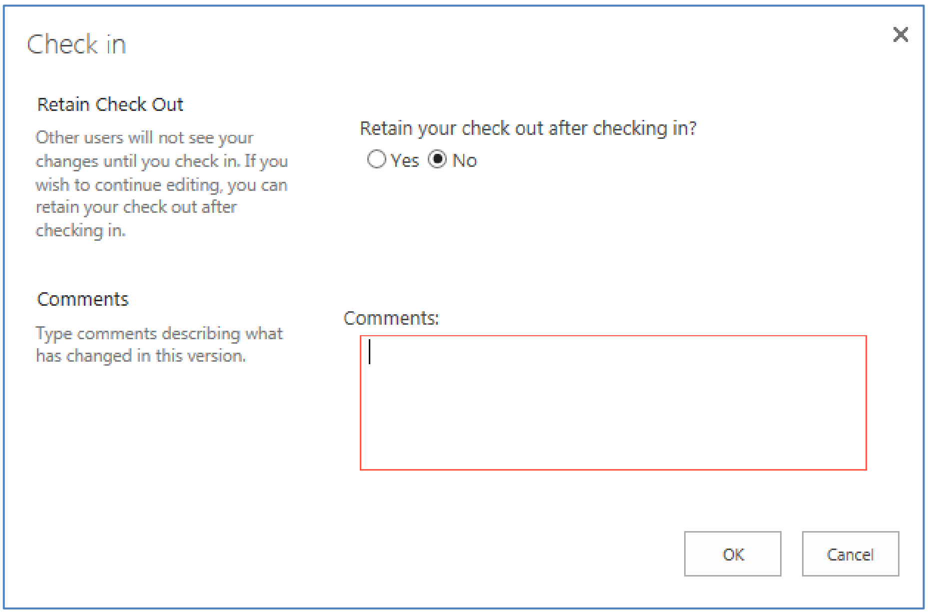
To check in a document in SharePoint:

1. Click the **Ellipse** ••• to the right of the file you wish to check in
2. Click the **Ellipse** ••• on the pop-up menu for more options
3. Click **Check In**



4. Decide if you would like to keep the document reserved to you after you have checked the document back into SharePoint. *This is set as no as a default.*

5. Type comments about the revisions you have made if applicable



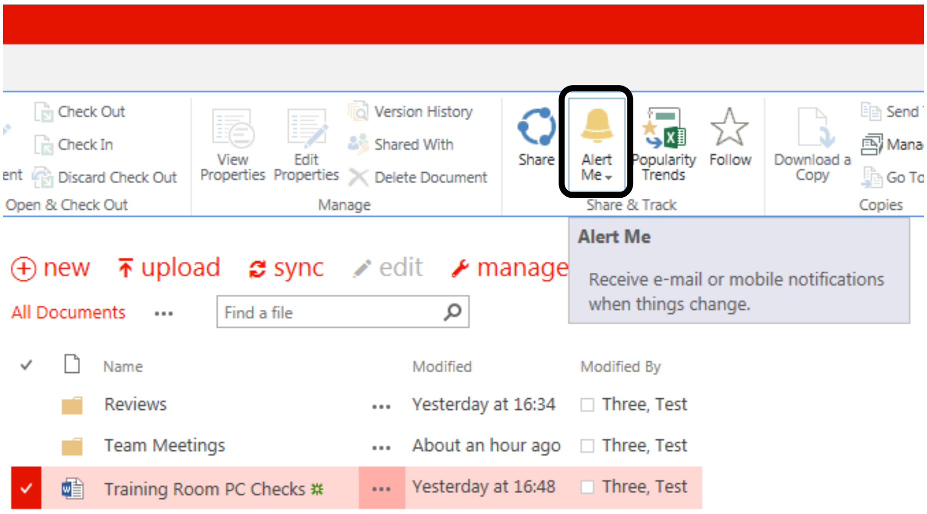
6. Click **OK.** *The green tag is now removed from the document name*

Set an alert on a document or file

You can receive an email whenever someone makes a change to your document in SharePoint.

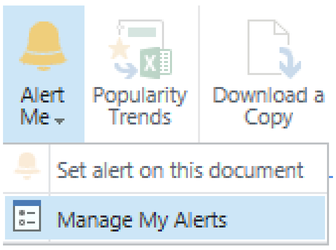
To set an alert:

1. Click in front of the chosen document to select it
2. Click the **FILES** tab
3. In the **Share & Track** group, click **Alert Me**
4. Click **Set alert on this document**

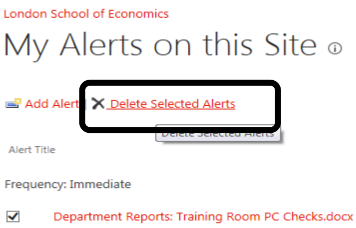


To remove an alert:

1. Click the **FILES** tab
2. In the **Share & Track** group, click **Alert Me**
3. Click **Manage My Alerts.** *You will see all your alerts listed*



4. Click in front of the alert you want to remove
5. Click **Delete Selected Alerts**

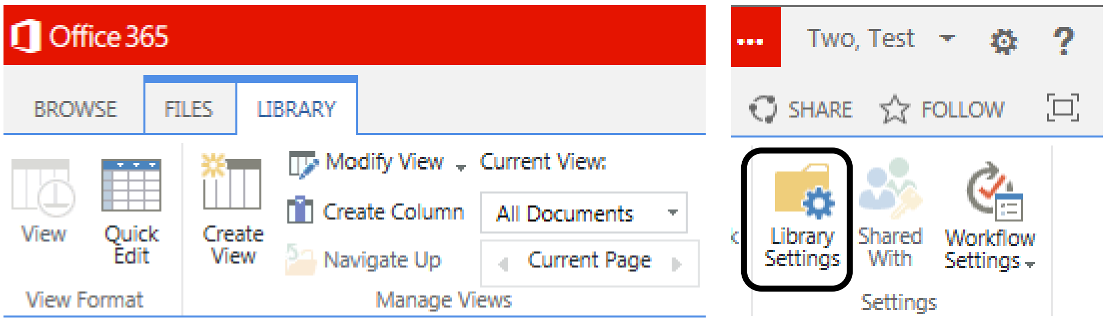


Working with document versions

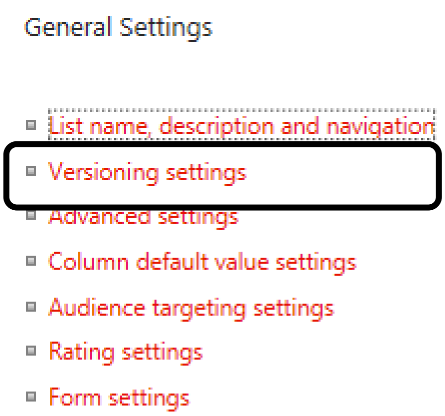
For any document or file stored in one of the default libraries provided with your team site type, document versioning will happen automatically. This means that as a document or file is edited, you will be able to return to earlier versions as well as see who created the various versions. The instructions below will show you how to work with versioning.

To set versioning on for a new document library:

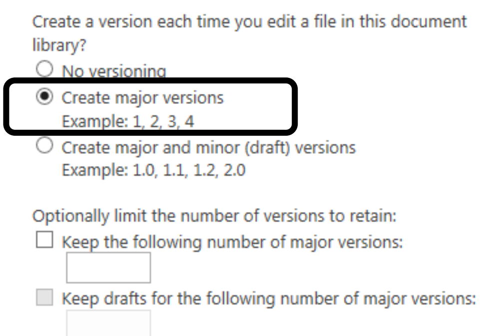
1. Open the library where you would like to set automatic versioning
2. Click the **LIBRARY** tab
3. In the **Settings** group, click **Library Settings**



4. Click **Versioning Settings**, which is under the **General Settings** section

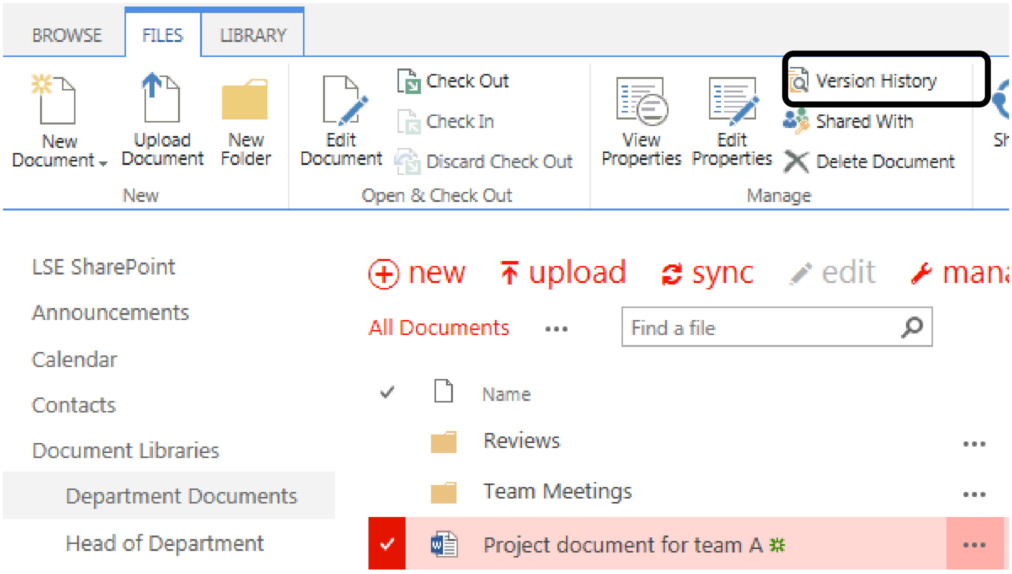


5. Click **Create major versions**
6. Click **OK**

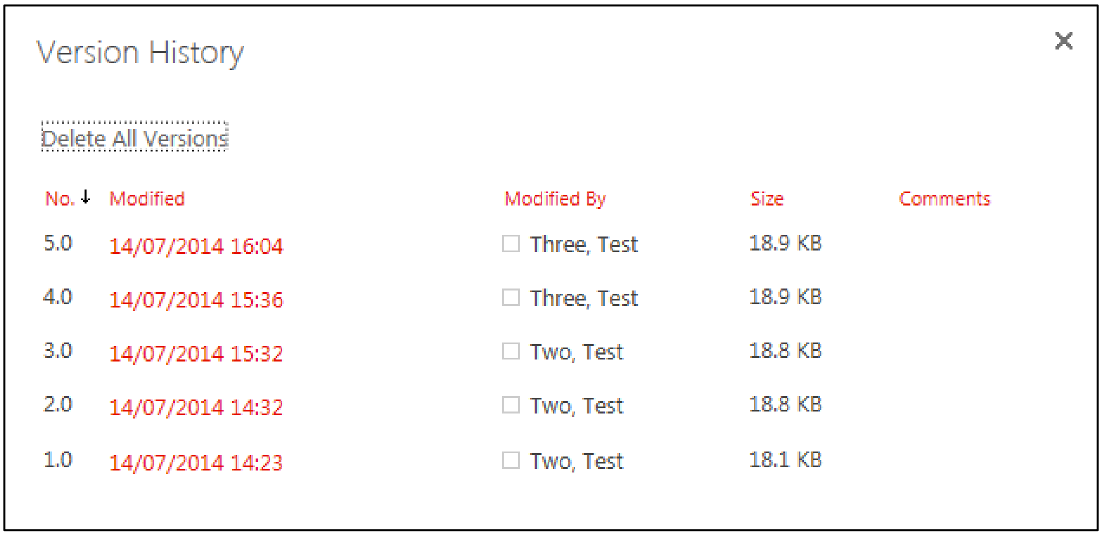


To view document versions:

1. Click in front of the document you wish to view to select it
2. Click the **FILES** tab
3. In the **Manage** group, click **Version History**

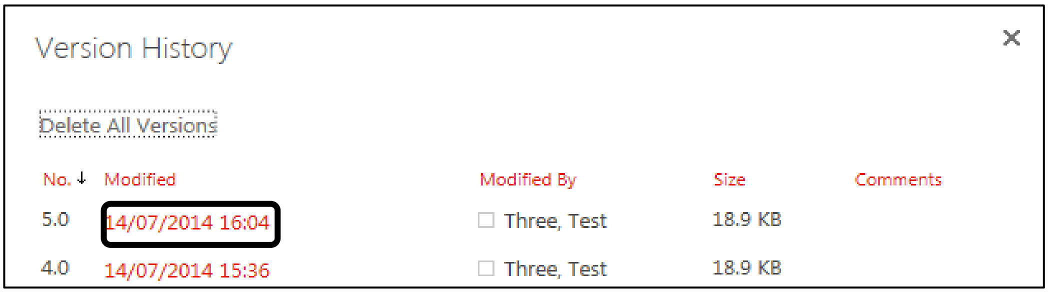


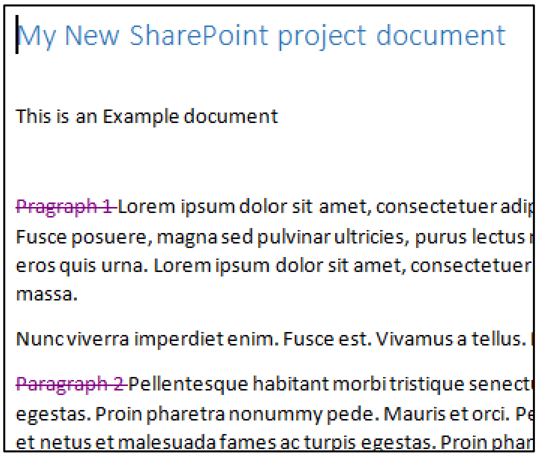
You can now see all the previous versions of the document.



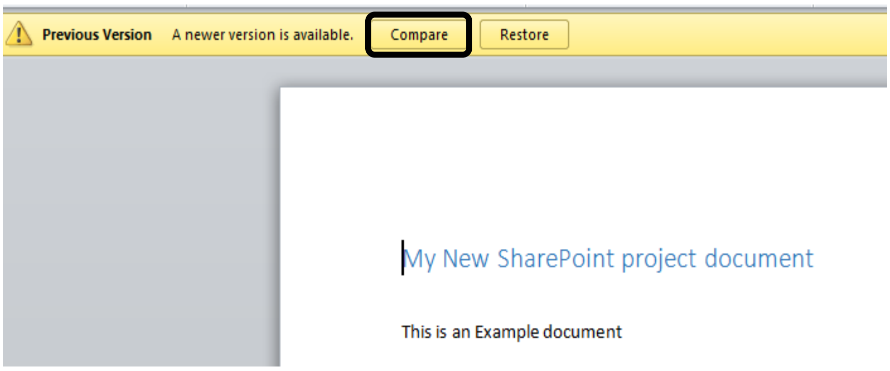
To compare changes to the document:

1. Click the link on the version you wish to review. *This will open in word on your PC and you can review the document.*

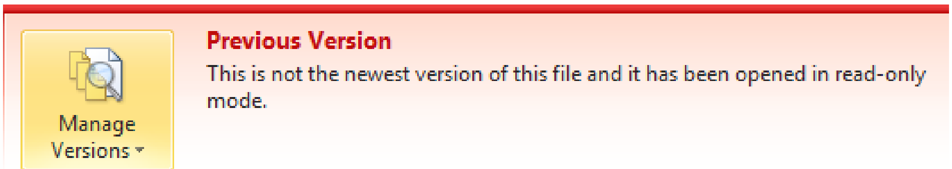




2. Click **Compare** for more detail. *The document will display the changes.*

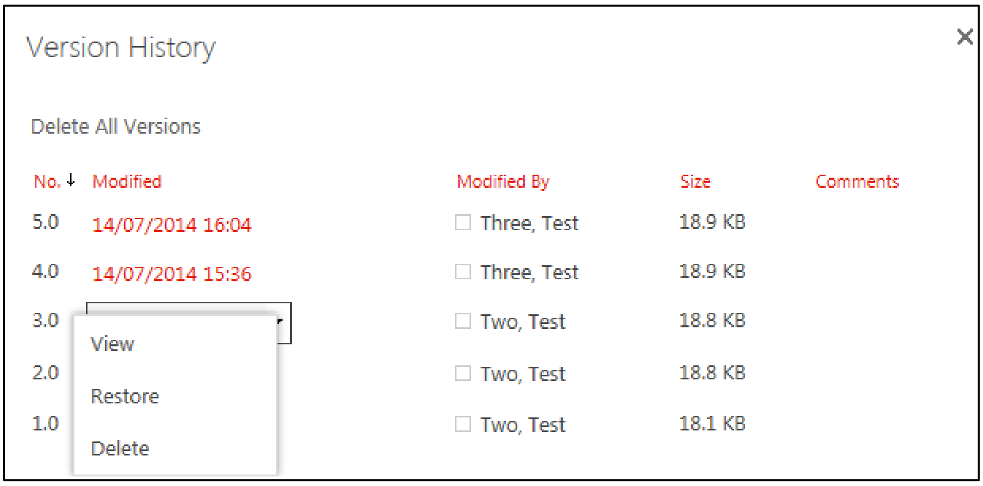


3. Click the **FILES** tab in Word
4. Click **Info**
5. Click **Manage Versions**. *This will allow you to choose what versions to compare. When you are finished, you can close the document in Word.*

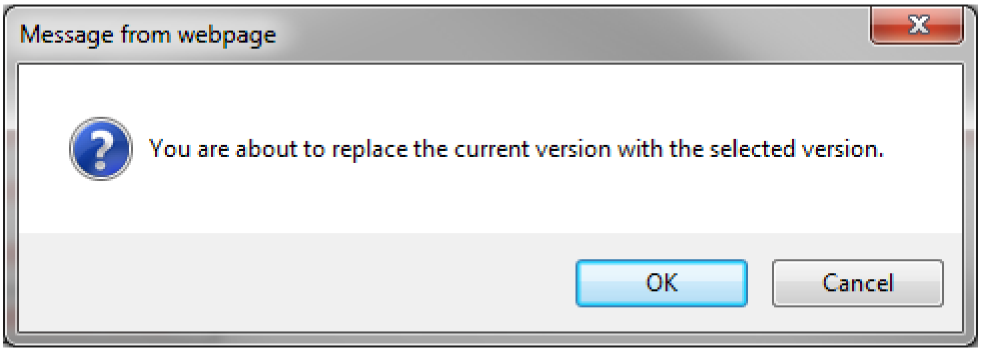


To restore an older version to the current version:

1. In the **Version History** window, select the ▾ to the right of the version you want to restore



2. Click **Restore.** *You will be warned that you are about to replace the current document version.*
3. Click **OK**

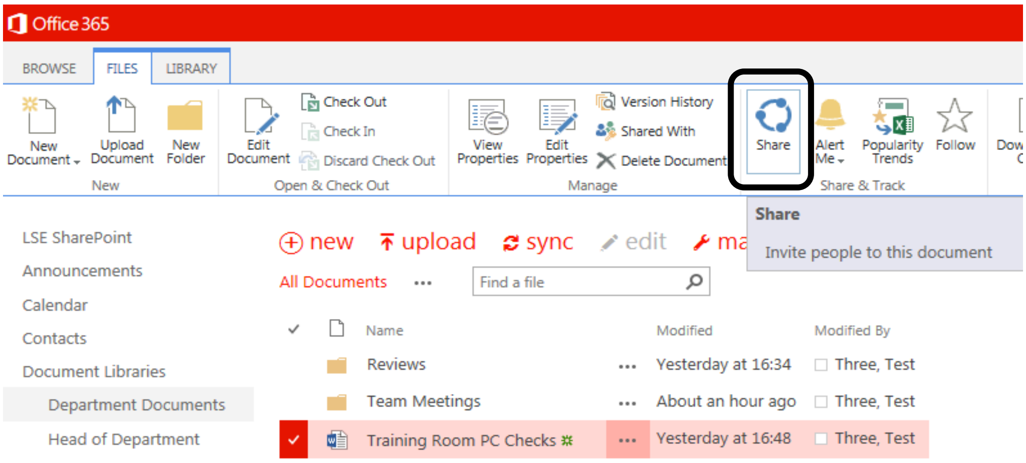


Share a document

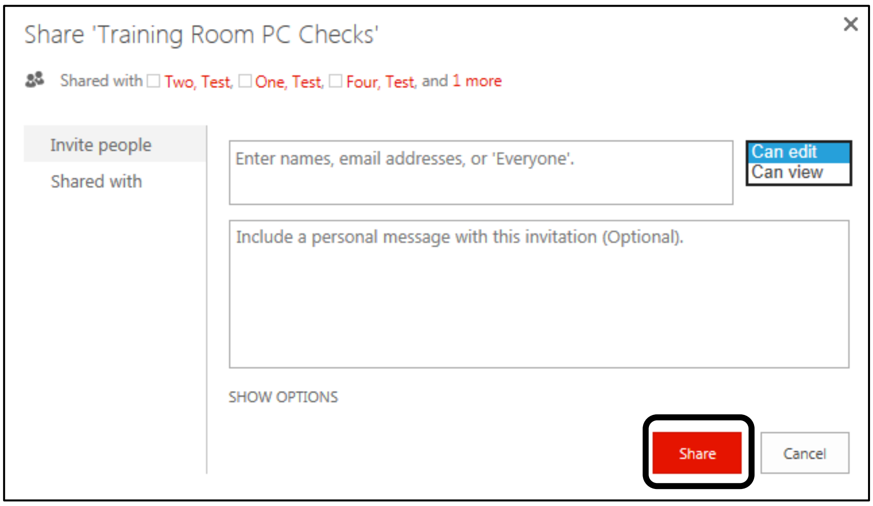
When you want to work **collaboratively** with an internal LSE colleague who is not currently sharing your SharePoint site, you can send a share invitation to the intended recipient. They will receive an email with a link to the document or file and will only have access to that particular document or file in SharePoint. By default, they will have **Members** access. The instructions below will guide you through the process.

To share a document:

1. Click in front of the document you wish to share
2. Click the **FILES** tab
3. In the **Share & Track** group, click **Share**



4. Click **Invite People**
5. Type the name of the person you wish to share the document with in the **Enter names, email addresses, or 'Everyone'** box
6. Select whether they can **Edit** or just **View** the document
7. Click **Share**



Subsites - Introduction

A subsite is an additional SharePoint team site created within the primary team site. It is very useful for projects or confidential information where the users should be restricted and different from the users of the primary team site. The subsite will have a Site Owner in the same way as the primary site has a Site Owner.

- **Primary Site Owner -** responsible for the primary team site and accountable for the entire site including all subsites.
- **Subsite Owner -** responsible for the subsite they have created.

As a member of a SharePoint team site you may become a member of a subsite at some point. You can use the subsite in that same way as your primary site. The following will help you to navigate to the subsite.

To navigate to a subsite:

1. In the left navigation menu of your primary site, click **Site Contents**
2. Scroll to the bottom of the page
3. Click on your **Subsite Name** link

To navigate back to the primary site or previous subsite:

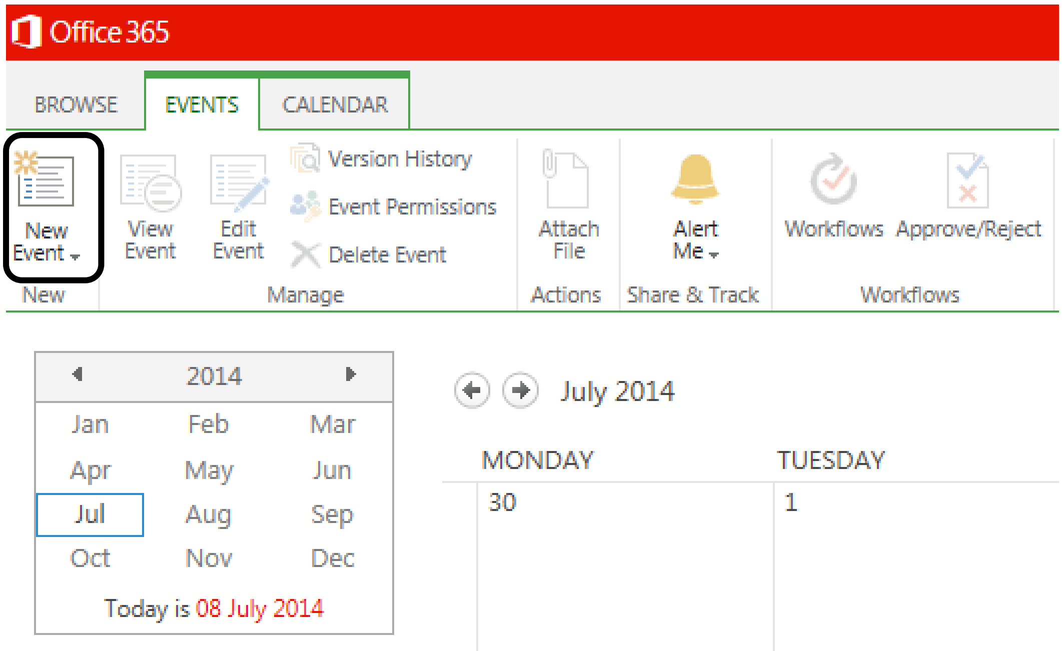
1. In the left navigation menu, click on your **Primary Site Name** or **Subsite Name**

Calendars

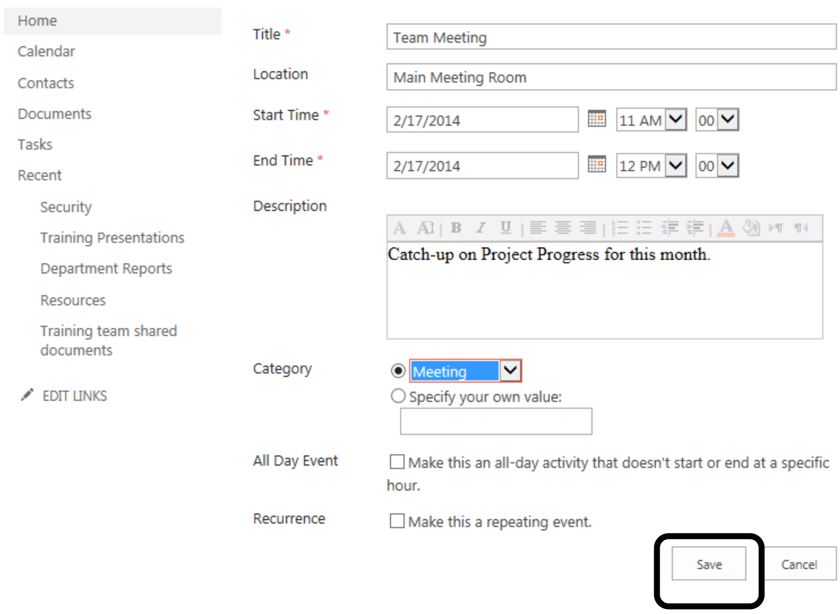
The calendar facility allows you to share your events with the SharePoint site team. You can also view this calendar in Outlook alongside your own Outlook calendar. You can also set an alert on a calendar item so you will know when a team member has made changes (in the same way as an alert on a document).

To create an event:

1. In the left navigation menu, click **Calendar**
2. Click the **EVENTS** tab
3. In the **New** group, click **New Event**

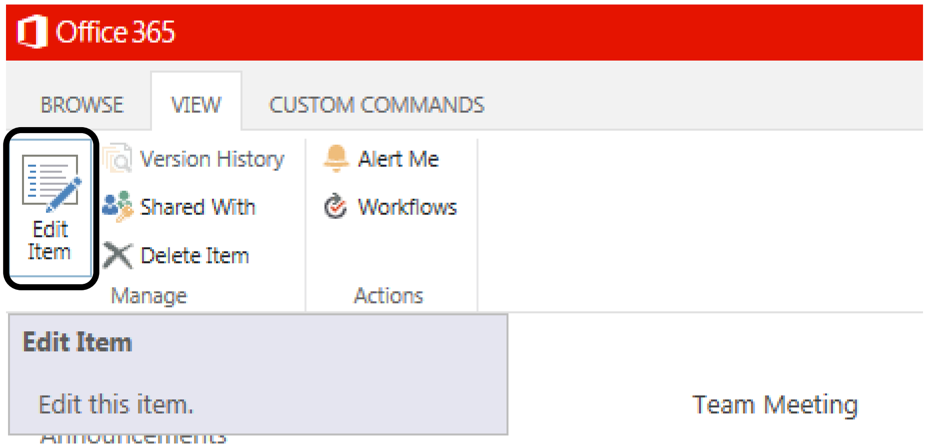


4. Type in the relevant boxes the **Event** details
5. Click **Save**

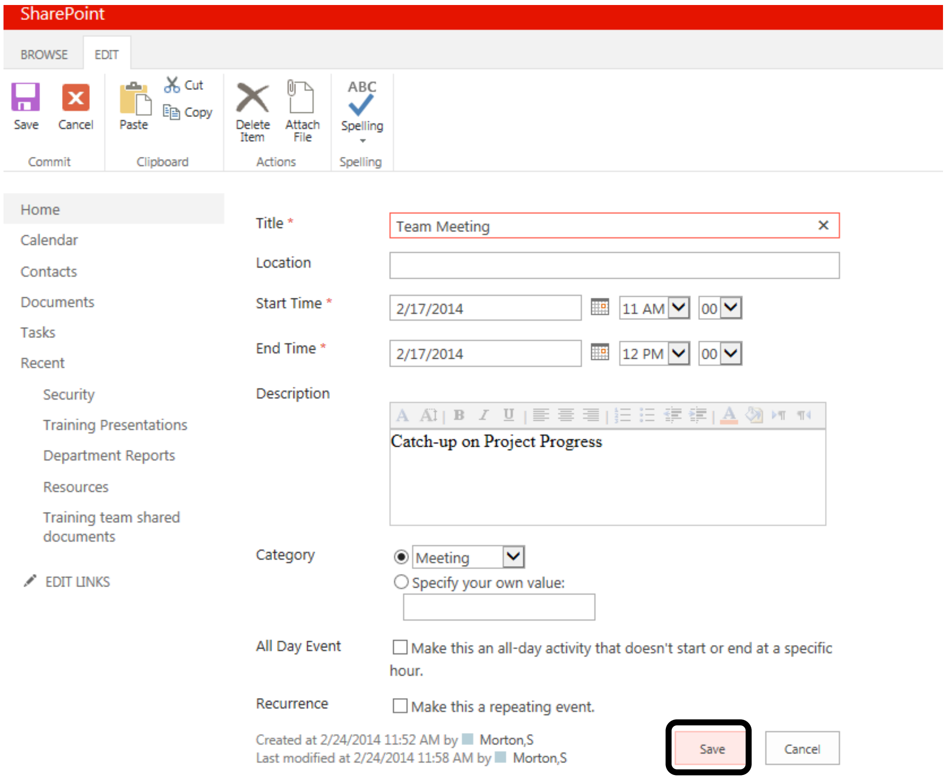


To edit a calendar event:

1. In the left navigation menu, click **Calendar**
2. Click on the link for the event
3. Click the **VIEW** tab
4. In the **Manage** group, click **Edit Item**

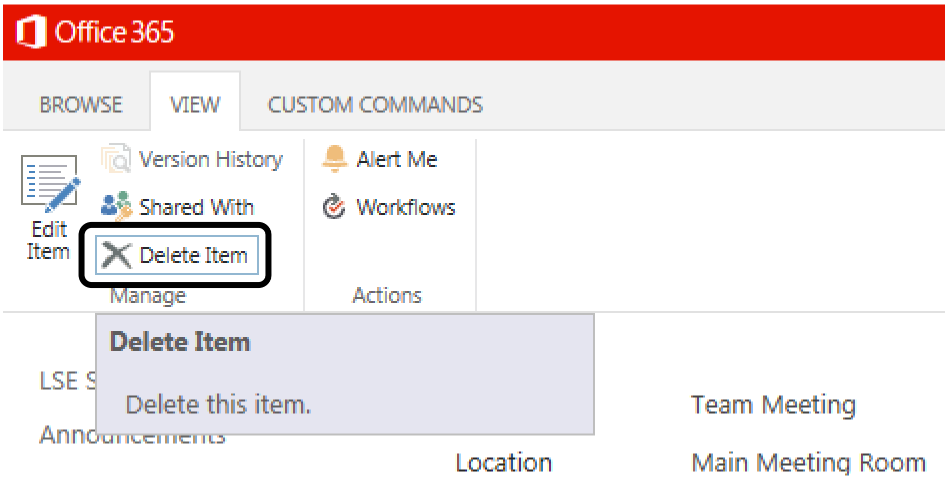


5. Make the changes
6. Click **Save**



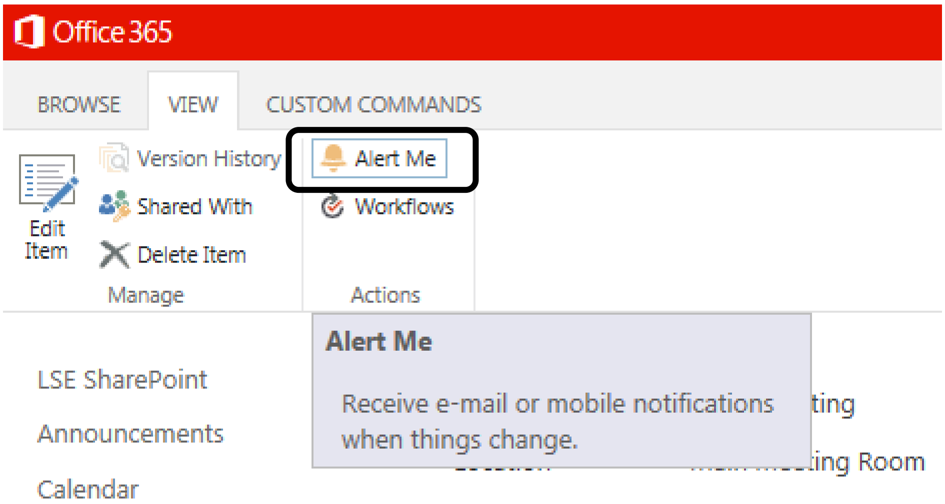
To delete an event:

1. In the left navigation menu, click **Calendar**
2. Click on the link for the event
3. Click the **VIEW** tab
4. In the **Manage** group, click **Delete Item**
5. Click **OK**



To set an alert on a calendar item:

1. In the left navigation menu, click **Calendar**
2. Click on the link for the event
3. Click the **VIEW** tab
4. In the **Actions** group, click **Alert me**
5. If necessary, make adjustment to the alert settings
6. Click **OK**

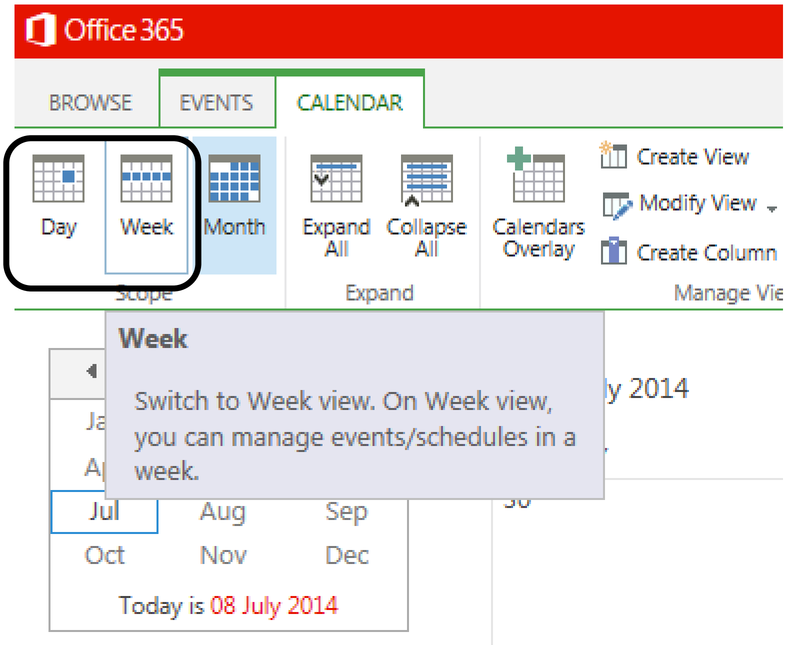


Viewing the calendar

You can change the view of the calendar from the default **Month** view to **Day** or **Weekly** view.

To change the view of the calendar:

1. In the left navigation menu, click **Calendar**
2. Click the **CALENDAR** tab
3. In the **Scope** group, click **Day** or **Week**

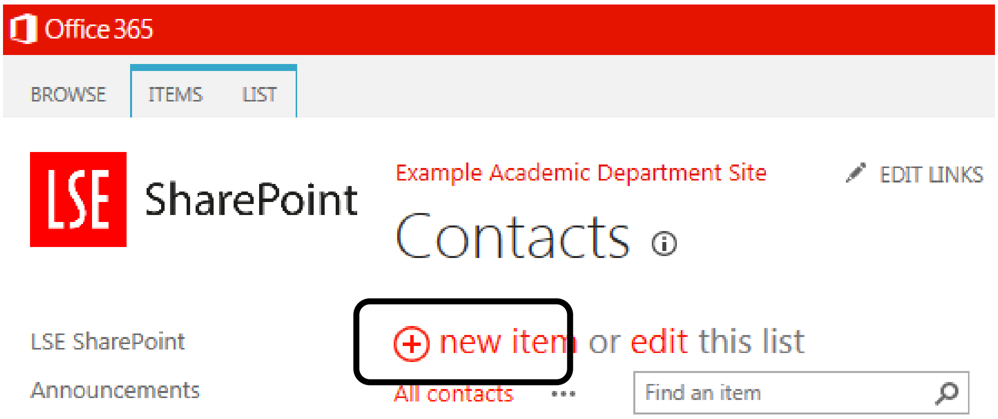


SharePoint contacts

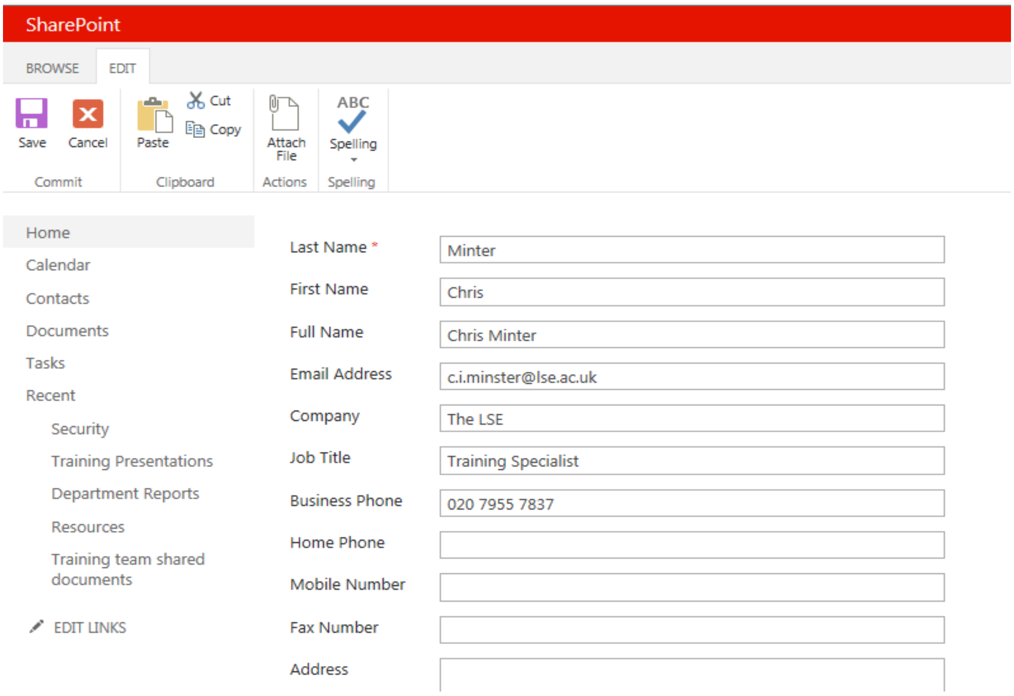
Contacts in SharePoint can be shared with your team and a list can be exported and used in Outlook if required.

To create a contact:

1. In the left navigation menu, click **Contacts**
2. Click **+ new item**



3. Fill out the contact form
4. Click **Save**

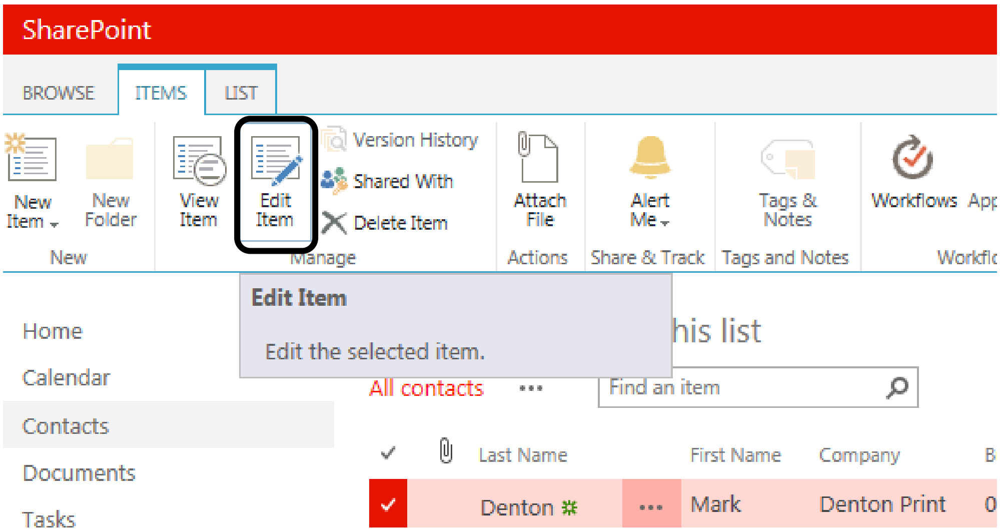


Edit a contact

There are two ways of editing a contact in your list. The following will show you both methods.

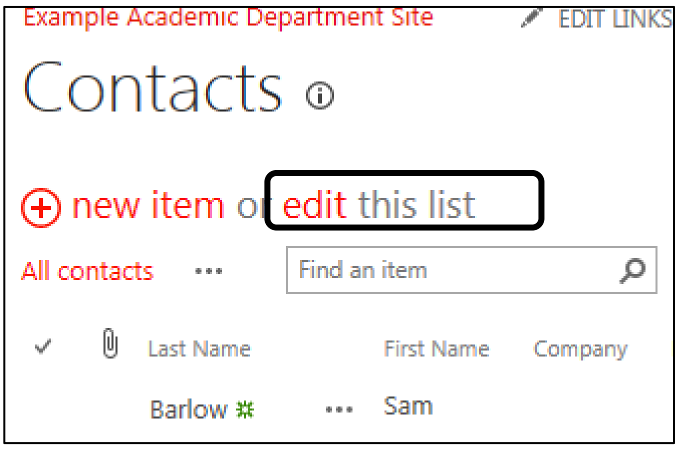
To edit using the contact form:

1. In the left navigation menu, click **Contacts**
2. Click in front of the contact you wish to edit
3. Click the **ITEMS** tab
4. In the Manage group, click **Edit Item.** *You will see the form again and you can edit any of the fields.*
5. Click **Save**



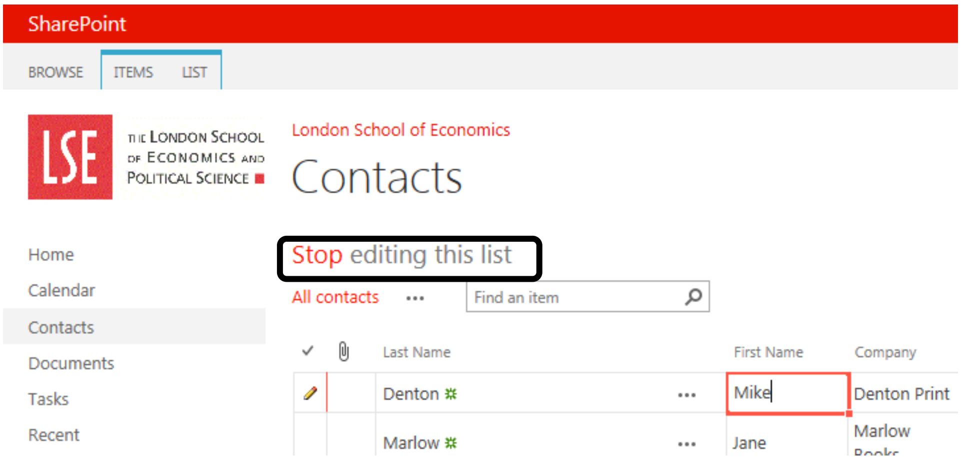
To edit using the contact list:

1. Click in front of the contact you wish to edit
2. Click **edit** above the contact list



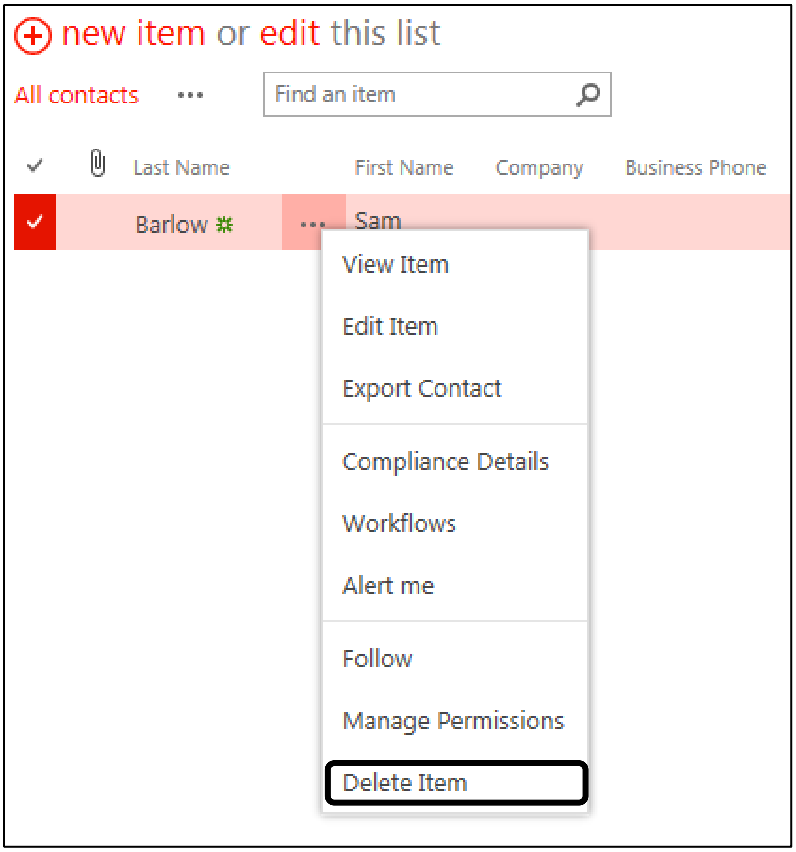
3. Click into the field you wish to edit to make changes

4. Click **Stop** above the contact list. *This will save your changes.*



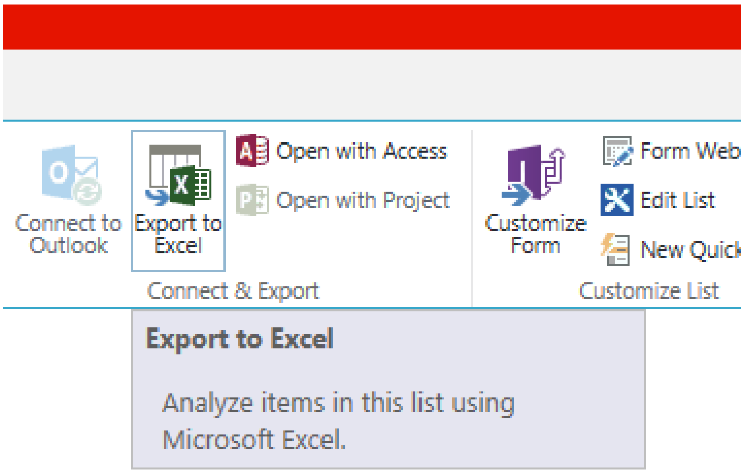
To delete a contact:

1. Click in front of the contact you wish to remove
2. Click the **Ellipse** •••
3. Click **Delete Item**

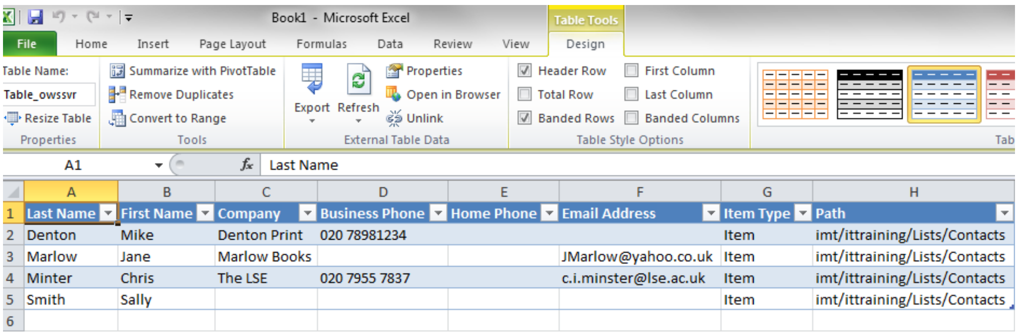


To export your SharePoint contact list:

1. In the left navigation menu, click **Contacts**
2. Click the **LIST tab**
3. In the **Connect & Export** group, click **Export to Excel**



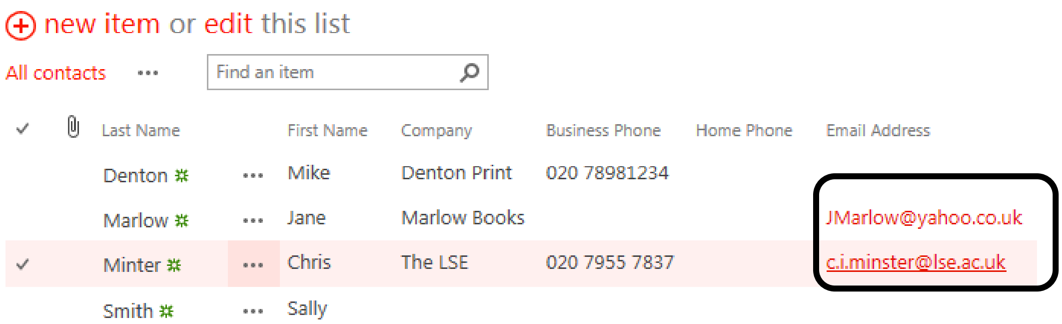
This will immediately create an Excel workbook and you will choose whether to open it now or save. Once you open the Excel workbook, you will see your contacts presented in easy to organise columns with filters ready for you to use.



Last Name	First Name	Company	Business Phone	Home Phone	Email Address	Item Type	Path
Denton	Mike	Denton Print	020 78981234			Item	imt/ittraining/Lists/Contacts
Marlow	Jane	Marlow Books			JMarlow@yahoo.co.uk	Item	imt/ittraining/Lists/Contacts
Minter	Chris	The LSE	020 7955 7837		c.i.minster@lse.ac.uk	Item	imt/ittraining/Lists/Contacts
Smith	Sally					Item	imt/ittraining/Lists/Contacts

To email individual SharePoint contacts:

1. In the left navigation menu, click **Contacts**
2. Click the email link on the contact. *This will open an Outlook email with the email address inserted ready to be used.*

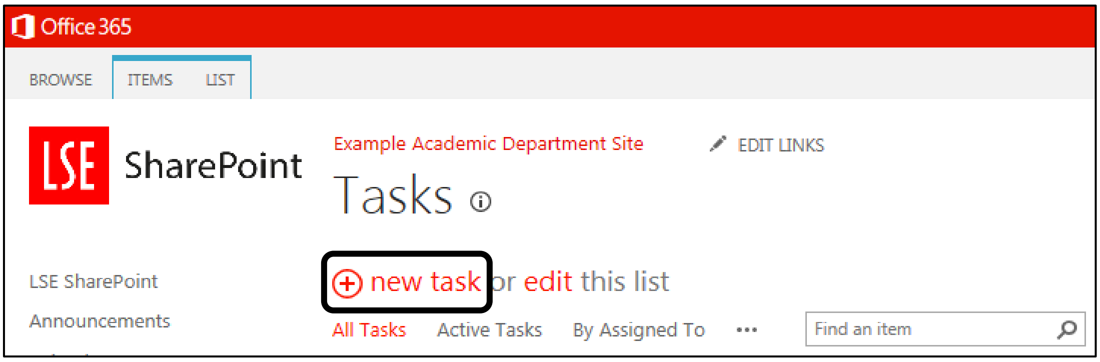


Tasks

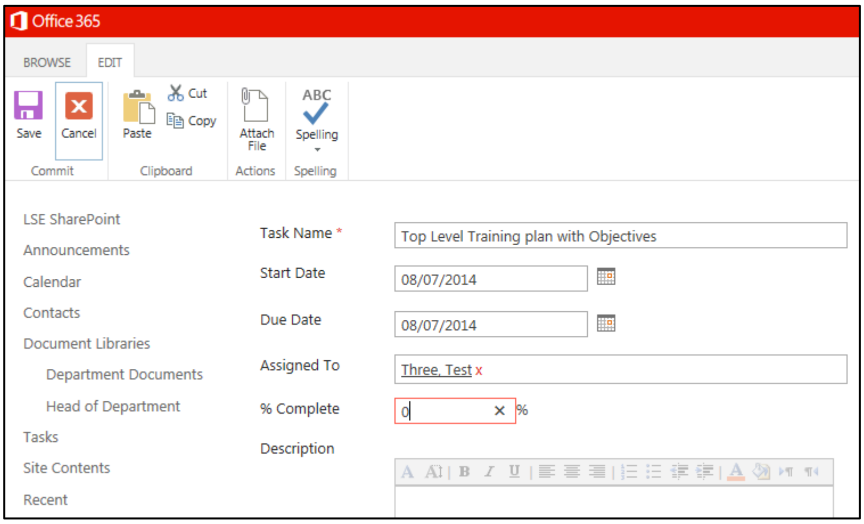
Tasks in SharePoint can be used to keep track of projects and who is responsible for which part of the project. As they are shared with your team in SharePoint, it is possible to allocate tasks to particular members of the team and all those involved can keep up to date with progress. The task list can also be viewed as a Gantt chart. SharePoint tasks can be viewed and updated in Outlook.

To create a task:

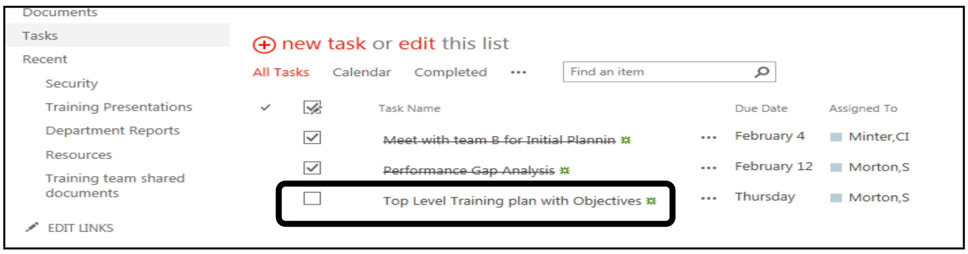
1. In the left navigation menu, click **Tasks**
2. Click **+ new task**



3. Complete the task form. *The **Assigned To** field is good to show who is responsible for a particular task.*
4. Click **Save**

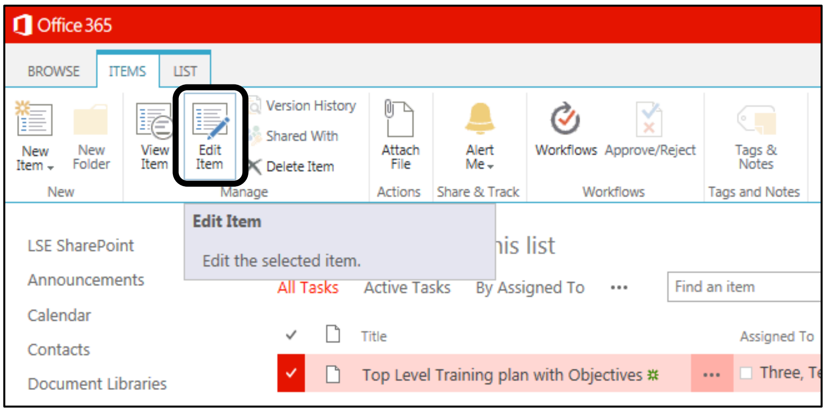


You will then see your new task listed below its predecessor tasks.

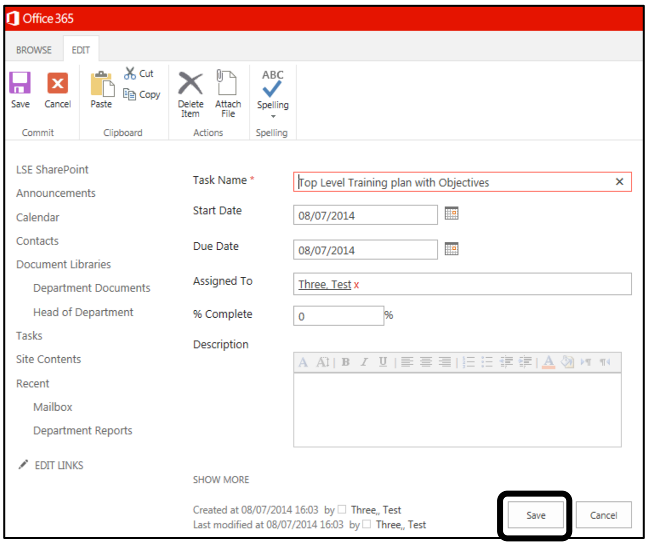


To edit a task:

1. In the left navigation menu, click **Tasks**
2. Click in front of the task you wish to edit
3. Click the **ITEMS** tab
4. In the **Manage** group, click **Edit Item**

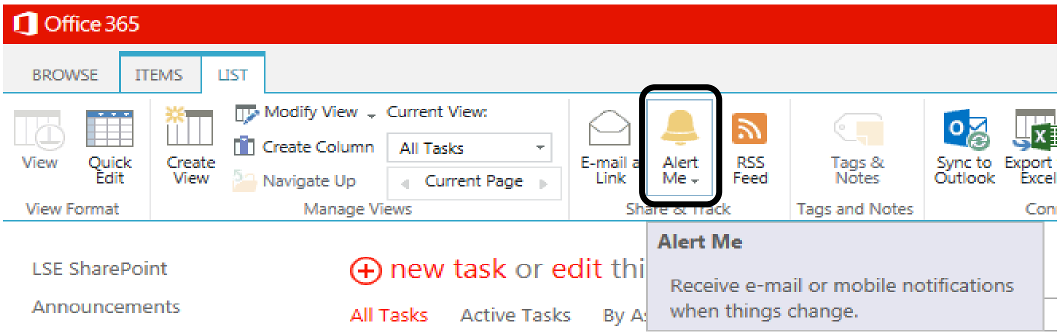


5. Make changes to the task
6. Click **Save**



To set an alert on a task list:

1. In the left navigation menu, click **Tasks**
2. Click in front of the task you wish to set an alert on
3. Click the **LIST** tab
4. In the **Share & Track** group, click **Alert me**
5. Adjust the alert settings if necessary
6. Click **OK**

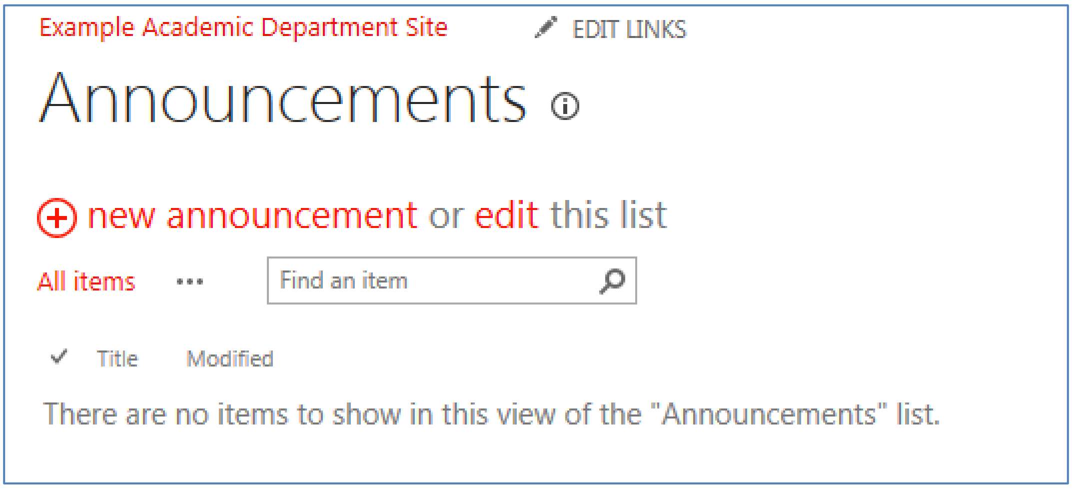


Announcements

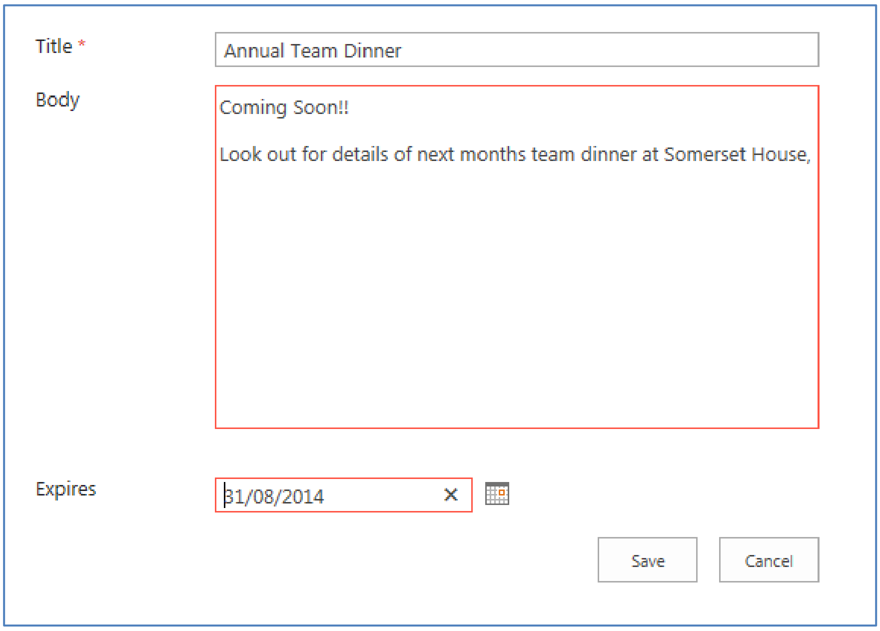
These are easy to set-up and maintain and could even include email alerts to make sure your team are aware of what's coming up.

To add a new announcement:

1. Click **Announcements** in the left navigation menu
2. Click **+ new announcement**



3. In **Title** bar type a subject name
4. In **Body** type the details of the announcement. *Notice how the Ribbon changes to show text formatting options to make your announcement eye catching.*
5. In **Expires** type a date to prevent your announcements from becoming out or date



6. Click **Save**

You will now see your new announcement at the top of the announcement list.

Legal and best practice guidelines for working within SharePoint

While working in SharePoint you must be aware of the guidelines around its use. Items you upload into SharePoint to share with your colleagues must be in line with the following legal requirements.

- **Copyright**
- **Freedom of Information**
- **Data Protection/Privacy**
- **Records Management**
- **Data Security**
- **Information Security**

Copyright

LSE is at risk of copyright infringement if you use a service such as SharePoint to make copyright materials available – this is particularly important if you are sharing the files with people external to LSE or with students.

If you are unsure whether your files are copyright material then seek advice before you share the files

Help and advice is available from the Learning Technology and Innovation. If you require further information, please contact the Copyright and Digital Literacy Advisor - Jane Secker; j.secker@lse.ac.uk; Tel: 020 7955 6530

Freedom of Information

The School is required, as a public authority, to respond to written requests for information within 20 working days.

A response can consist of: the information requested; or reasons as to why the information is exempt; or a refusal on the basis of cost, repeated request or vexatiousness.

Handle normal enquiries as required by your department/division, but any requests you would not normally handle or would like to exempt the information should be forwarded to the Information Rights team.

Click here for more information on Freedom of Information and your legal obligations as a member of staff or student of the LSE.

Data protection/privacy

Personal data is that which identifies or is about a living individual.

Personal data must be processed fairly, lawfully, relevantly, accurately, no longer than necessary, in accordance with the individuals' rights, securely and not transferred outside the EEA.

Individuals can request copies of information that the School holds on them or to have incorrect information corrected or removed.

Click here for more information on Data Protection and your legal obligations as a member of staff or student of the LSE.

Records management

Any information you create or keep in the course of your work that shows what actions or decisions are taken could be considered a record. A record can be in paper or electronic format.

Records may be needed at any time for legal purposes or to provide information on request (FoI). They should be managed so the right record can be provided to the right person at the right time.

Managing records means ensuring you create the records you need, maintain these while they are being used, then dispose of them either through secure destruction at the end of their retention or deposit in the School's Archives.

Further information on Freedom of Information, Data Protection and Records Management can be obtained from the Legal & Compliance Division, or enquiries can be made directly to: Rachael Maguire, r.e.maguire@lse.ac.uk, ext. 4622, or Dan Bennett, d.bennett@lse.ac.uk, ext. 6481.

Data security

1. Classify your data

Use LSE's Information Classification Standard

- How confidential is your data?

- Is personally identifiable data involved?

Check any contracts to do with the data

- Do they require any particular compliance e.g: ISO27001, Data Protection Act, NHS Information, Governance Toolkit, must be accessed/processed onsite

Think about the risks if the data were to leak out and make sure the team are aware of:

- Reputational damage

- ICO fine

- Contracts rescinded

2. Sharing your data

Who needs access?

Use ‘least privilege’

- Only provide enough access rights to data that people need to do their job

Use ‘Need to Know’

- Only give data access to those who have a valid need for it

Structure your folders so you can give the right access levels to the right people

3. Keeping your data secure

Is folder-level access restriction enough?

If not, use file encryption

- There are plenty of free tools e.g. 7-zip, Axcrypt

- LSE encryption guidelines can be found here.

Check that people accessing the data remotely:

- Use password protected machines

- Run up-to-date anti-virus software

- Are aware of the risks

Be aware that LSE staff must not store any bank payment card information on any SharePoint site. This is now LSE policy.

Contact information for Data Security section:

Jethro Perkins

Information Security Manager

Information Management and Technology

Tel: 020 7955 6641

Email: j.a.perkins@lse.ac.uk

Please send feedback or suggestions for updates to the following email address IT.Training@lse.ac.uk