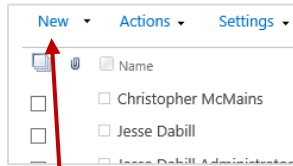


This quick reference document is designed for “owners” responsible for maintaining a specific SharePoint site. See “SharePoint Quick Reference” for basic SharePoint operation.

Maintain Members

Add New Members

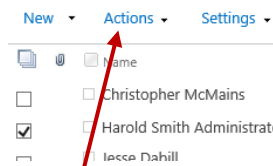
1. Navigate to your committee site homepage.
2. Click the **Settings** icon (upper-right).
3. Click **Site settings**.
4. Click **Site permissions** (under “Users and Permissions”).
5. Select the desired category (e.g. *committee_name* Members, *committee_name* Owner).
A list of current members will display.



6. Click the **New** link.
7. Enter the name(s) or e-mail of the new member(s).
8. Optional: Enter an invitational message.
9. Click **Share**.

Remove Members

1. Navigate to your committee site homepage.
2. Click the **Settings** icon (upper-right).
3. Click **Site settings**.
4. Click **Site permissions** (under “Users and Permissions”).
5. Select the desired category (e.g. *committee_name* Members, *committee_name* Owner).
6. Click the check box to the left of the member's name.



7. Click the **Actions** link.
8. Select **Remove Users from Group** from the dropdown list.
9. Click **OK**.

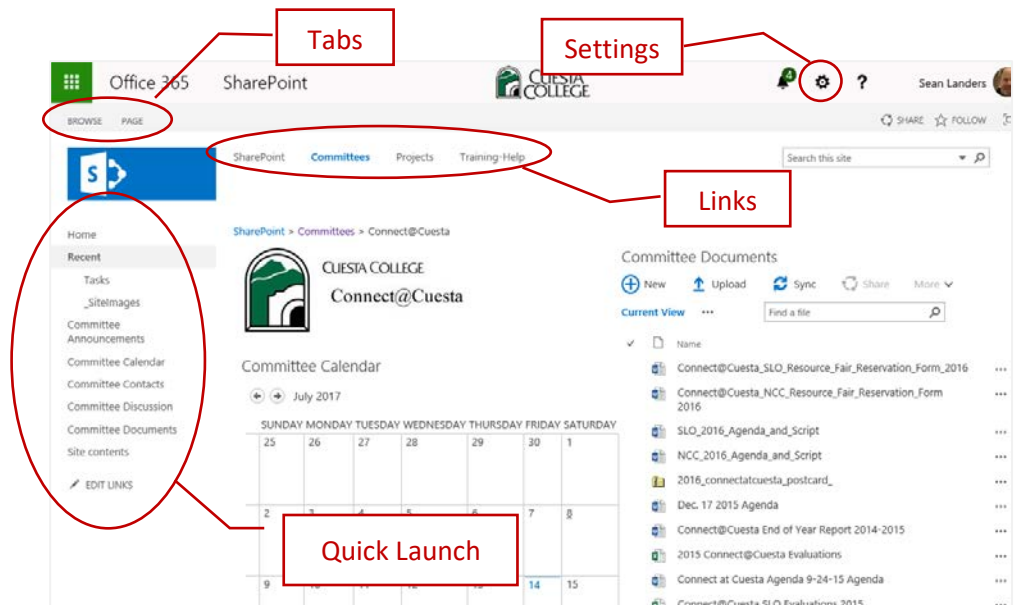
TIP - Display Links

Sometimes the Ribbon will hide the Links bar.

- Click **Browse (Tabs)** to display Links.

TIP - No Folders

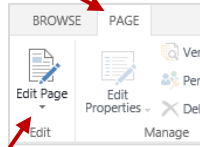
Folders are largely unnecessary. Keep all documents in a single library; use different views to list only those documents that meet specific criteria.



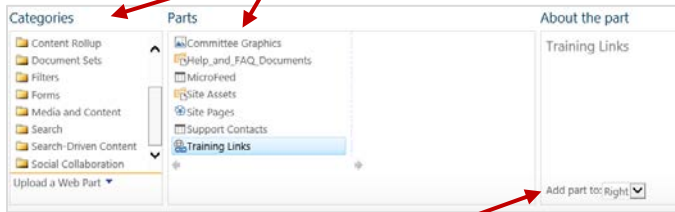
Customize Site

Add Web Part

1. Navigate to committee home page.
2. Click the **Page** tab, above the ribbon.







3. Click **Edit Page** on the ribbon.
4. Click **Add a Web Part** in the desired (left or right) column.
5. Select the appropriate category and then click the desired part.



6. Verify **Add part to** is set to the correct column.
7. Click the **Add** button.
8. When finished, click **Stop Editing** on the ribbon.

Edit Links (Quick Launch)


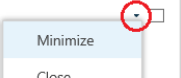

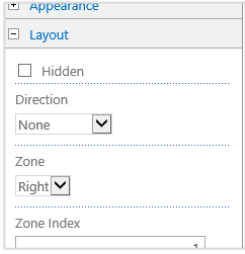
1. Click **EDIT LINKS** in Quick Launch. 
2. Perform one of the following:

Add link	<ol style="list-style-type: none"> Click the + link button.  Complete the "Add a link" form. Click OK.
Edit link	<ol style="list-style-type: none"> Click the link name. Click the Edit a link icon.  Update the "Edit link" form. Click OK.
Delete link	<ol style="list-style-type: none"> Click the "remove" button to the right of the link. 
Reorder links	<ol style="list-style-type: none"> Drag the link up/down to reorder. Drag link left/right to demote/promote.

3. Click **Save**. 


Move Web Part

1. Navigate to committee home page.
2. Click the **Page** tab above the ribbon.
3. Click **Edit Page** on the ribbon.
4. Do one of the following:

Move up/down	<ol style="list-style-type: none"> Position the mouse pointer at the top of the web part. <i>Pointer will change to 4-headed arrow.</i>  Drag the web part up or down to the new location. <p>Note: If necessary, click the menu button (upper-right) and then click Minimize from the short-cut menu to minimize a web part. </p>
Move left/right	<ol style="list-style-type: none"> Click the menu button  (upper-right). Select Edit Web Part from shortcut menu. <i>A properties dialog will appear on the right.</i> Click the plus (+) to the left of Layout. <i>The menu will expand.</i>  <ol style="list-style-type: none"> Change the Zone to "Left" or "Right".

5. When finished, click **Stop Editing** on the ribbon.


Remove Web Part

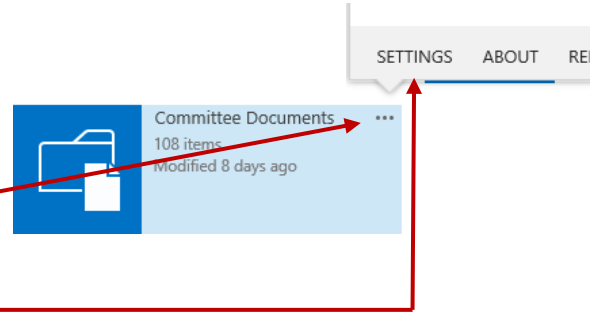
1. Navigate to committee home page.
2. Click the **Page** tab, above the ribbon.
3. Click **Edit Page** on the ribbon.
4. Click the menu button  (upper-right).
5. Select **Delete** from shortcut menu.
6. Click **OK**.
7. When finished, click **Stop Editing** on the ribbon.

Add Academic Year Metadata

Add New Academic Year Metadata Value

Annually a new metadata value must be added to the committee's site for that academic year.

1. Navigate to committee homepage.
2. Click the **Settings** icon  (upper-right).
3. Click **Site contents**.
4. *Point* at "**Committee Documents**" and click the ellipsis (...) upper-right.
A pop-up menu will display.
5. Click **Settings**.
6. Click **Academic Year** (under "Columns").
7. Under "Additional Column Settings", *append* the new academic year to the list in the field, "**Type each choice on a separate line**".
8. In "**Default value**", verify the radio button, **Choice**, is selected, and then type the desired value *exactly* as entered in step 7.



Additional Column Settings

Specify detailed options for the type of information you selected.

Description:

Require that this column contains information:
 Yes No

Enforce unique values:
 Yes No

Type each choice on a separate line:
2014 - 2015
2015 - 2016
2016 - 2017
2017 - 2018

Default value:

Choice Calculated Value

2017 - 2018

9. Click **OK** at the bottom of the screen.

Views

Create View

1. Navigate to committee homepage.
2. Under "Committee Documents", click the ellipsis (...) to the right of "Current View".
3. Select **Create View** from shortcut menu.
4. Click **Standard View**.
5. Complete the onscreen form:
 - Enter a "View Name".
 - Select which columns to display and in what order (position).
 - Arrange document order by using **Sort**.
 - Display specific documents using **Filter**.
6. Click **OK** at the bottom of the screen.

View Name:
Docs for 2019-2020

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 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"/>	Academic Year	5
<input type="checkbox"/>	ACCJC Std	6

Modify View

1. Navigate to committee homepage.
2. Click the ellipsis (...) to the right of "Current View" and select the desired view.
3. Click the ellipsis again and select **Modify this View**.
4. Make the desired changes and then click **OK**.

Delete View

1. Navigate to committee homepage.
2. Click the ellipsis (...) to the right of "Current View" and select the desired view.
3. Click the ellipsis again and select **Modify this View**.
4. Click **Delete** and then click **OK**.



Upload Files

File Name Convention

- Filenames should contain *only* letters, numbers, and underscores.
 - Use underscores instead of spaces.
 - Do not use punctuation or special characters.
- Include dates at end of the filename.
- Order elements from general to specific.


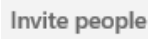
Example: ProgramReview_DueDateCheck_2018Sep10.docx

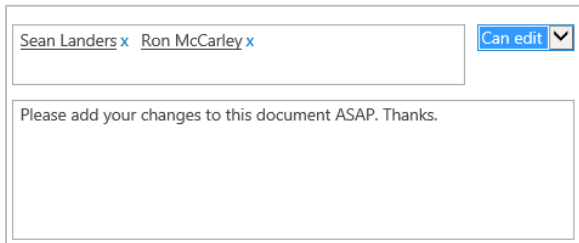
Upload File

1. Click **Committee Documents** in the Quick Launch bar.
2. Click **Upload** at the top of the document list. 
3. Click **Browse** and then locate & double-click on the file.
4. Click **OK**.
5. Complete the form, entering the appropriate metadata.
 - Type desired data or select from list as you type.
 - Click **Browse** button  and choose desired option(s).
 - Enter “NA” if no options apply.
6. Click **Check In** at the bottom of the form.

Share Files


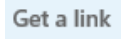
Share File

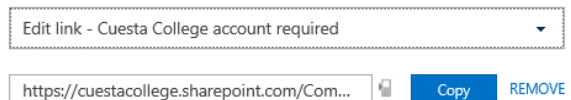
1. Click the ellipsis (...) to the right of the file.
2. Click **Share**, bottom of the pop-out menu. 
3. Select **Invite people** in left column. 
4. Complete the onscreen form:
 - a. Enter the names or email addresses of people.
 - b. Select “Can edit” or “Can view”.
 - c. Optional: Type invitation text.



5. Click **Share**. 

Share File via Link


1. Click the ellipsis (...) to the right of the file.
2. Click **Share**, bottom of the pop-out menu. 
3. Click **Get a link** in left column. 
4. Select link attribute (e.g. Restricted, View, Edit, etc.)



5. Click the **Copy** button.
6. Paste the copied link as desired (e.g. in an e-mail, etc.).

Announcements

Announcement

1. Click **Committee Announcements** on the Quick Launch bar.
2. Click **new announcement**.  **new announcement**
3. Complete the New Item form and then click **Save**.

Note: Be sure to include an expiration date.

Versioning

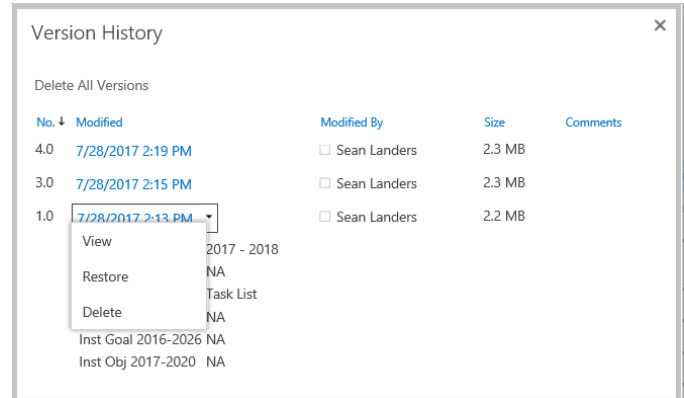
View Previous Version

1. Click **Committee Documents** in the Quick Launch bar.
2. Right-click on a desired document.
3. Select **Version History** from the shortcut menu.
4. Point on Modified date, and then click the arrow to the right of the date.

To view document version, click on the modified date.

5. Do one of the following:

View	<ol style="list-style-type: none"> a. Click View on shortcut menu. <i>Version details will be displayed.</i>
Restore	<ol style="list-style-type: none"> a. Click Restore on shortcut menu. b. Click OK at confirmation message. <i>A new version will be created from the selected version.</i>
Delete	<ol style="list-style-type: none"> a. Click Delete on shortcut menu. b. Click OK at confirmation message. <i>That version will be deleted from version history.</i>



6. Click the **Close Dialog** button. 