

SharePoint USER GUIDE



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ABOUT THE USER GUIDE

This User Guide is intended for users across the organization to become proficient at the varying functions of SharePoint. Many SharePoint functions have more than one method to accomplish a task. This User Guide captures one method in some instances and multiple methods in other instances. No method is more proper than another as it depends on each user's comfort level.

OBJECTIVES AND OUTCOMES:

- Navigate SharePoint
- Upload documents into the Document Library on SharePoint
- Tag documents for refined search results
- Search documents in SharePoint
- Edit documents in SharePoint
- Differentiate versions of documents in SharePoint

ADDITIONAL TRAINING TOPICS:

[Introduction to SharePoint](#)

[Sign into SharePoint](#)

[Customize SharePoint](#)

[Create and Share Files](#)

[Document Collaboration](#)

WHAT IS SHAREPOINT?

SharePoint is a cloud-based service designed to manage content. It's interactive features allow for team members to collaborate in real time across the miles.



Data Security

Manage security settings to allow access to files to those who need to revise them.



Search Function

Search all files by a word or a specific filter. Locate the right file the first time.



Sharing

Sharing has never been easier. Send a link to the file rather than downloading and emailing.



Collaborating

Collaborate and co-author files in real time or at different times.



Version Control

Keep track of all previous versions. View them or restore them.



Productivity

Spend less time searching, retyping pdfs and enjoy work process automation.

GLOSSARY OF TERMS

Approve	A document can be submitted for approval by a user to notify the document owner that final revisions have been made. A copy of a document that has been "approved" has placed on the Published Documents site.
Controlled Document	A special type of document such as a Standard whose publishing is controlled. Controlled documents have metadata that define their type and usage.
Document	Any file stored on SharePoint such as .docx, .xlsx, .pptx, .pdf, .jpg.
Document Library	A file structure within SharePoint to store different types of documents. This is different from the term "Document Library" when it refers to the public website.
Global Navigation	Links on the top of a SharePoint page of most SharePoint sites. All working document sites associated with the Published Documents site share a common global navigation. Other SharePoint sites may have a different global navigation.
Home Page	The main landing page of any Team Site in SharePoint and contains a page layout to configure your apps.
Hub Site	A hub site is a special kind of team site in SharePoint. It is the 'top level' site in a group of related sites. For Controlled Documents, the hub site is the Published Documents site. Working document sites for all the working groups are related to that hub site, and share a common global navigation.
Meta Data	Data that provides additional information about a document that has been uploaded to a document library. This is critical to helping find documents in SharePoint. Controlled documents are an example.
Published Document	A standards or other controlled document that has been approved and published. A published document is a copy of a working document that has been approved and placed in the Published Documents library. This is different from a 'major version' of a document.
Search Bar	Located at the top of any SharePoint page, enter any word or term into the search bar in order return results to locate a desired document. This is a different type of search than the customized document search page. To find controlled documents, the easiest way is to start with the Search Widget, or visit the document search page where you can search by metadata.

Search Widget

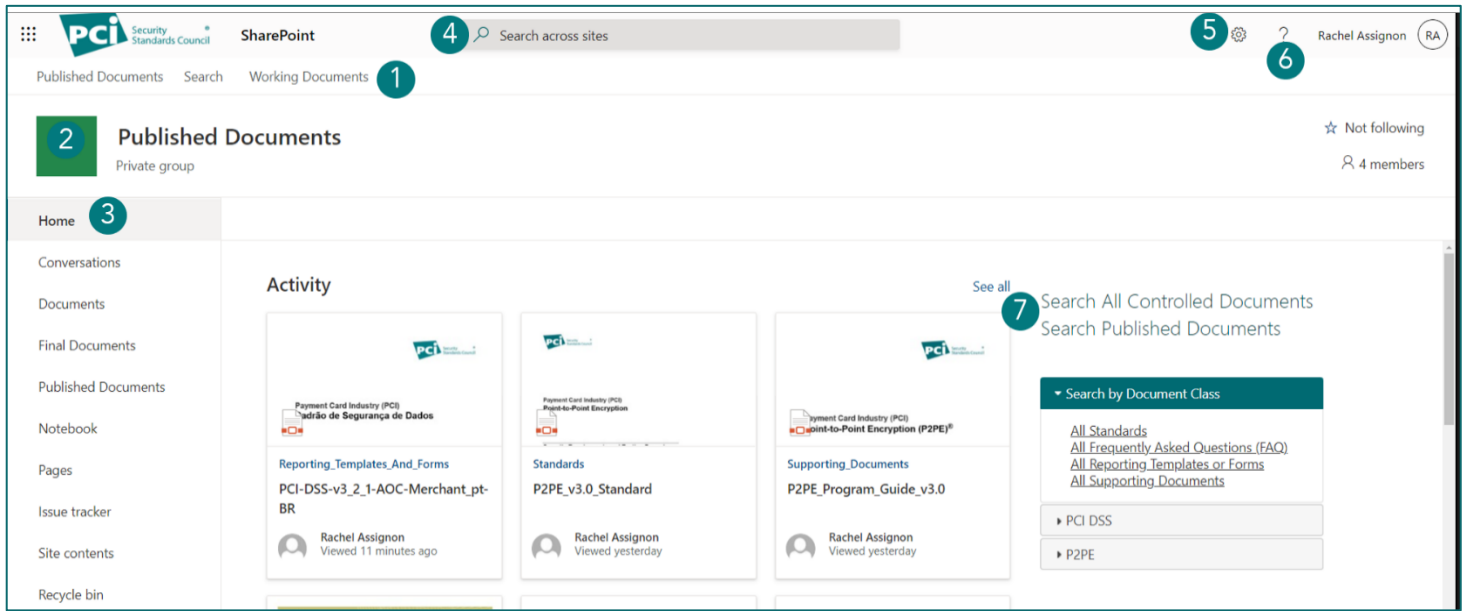
Search tool that can quickly filter documents by type or category.

Version Control

The ability to track changes to a document and save them so previous changes can be easily rolled back if need be. Both major and minor versions can be tracked. If properly configured, users who do not have editing rights to a document will only be able to see major versions.

SHAREPOINT NAVIGATION

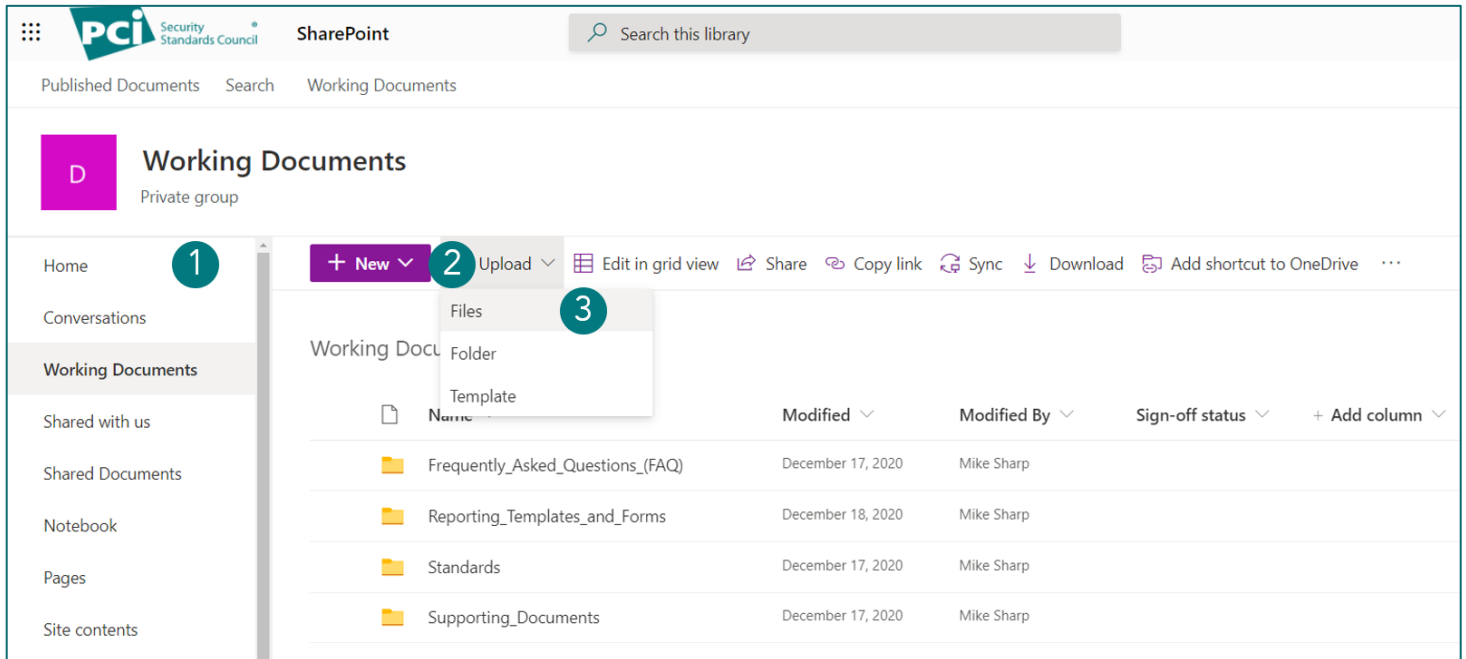
SharePoint is designed to help you locate information quickly and easily. Follow the navigation below to learn more about the layout of the home page.



- 1 **Global navigation:** links for site navigation
- 2 **Home page:** this link will return to the home page.
- 3 **Current navigation:** provides shortcuts to commonly visited sites
- 4 **Search bar:** searches the whole site for all items and documents
- 5 **Settings:** customize settings for the site
- 6 **Help:** ask for help by exploring built in topics
- 7 **Search widget:** only searches controlled documents

UPLOADING DOCUMENTS

Upload existing files directly into SharePoint. Files formats that are acceptable are .docx, .xlsx, .pptx, .pdf, .png, .jpg, and more.



1. Navigate to desired SharePoint Library and click Upload and locate file
2. Click Upload
3. Select Files from the drop-down menu



NOTE

Information is automatically loaded in columns.

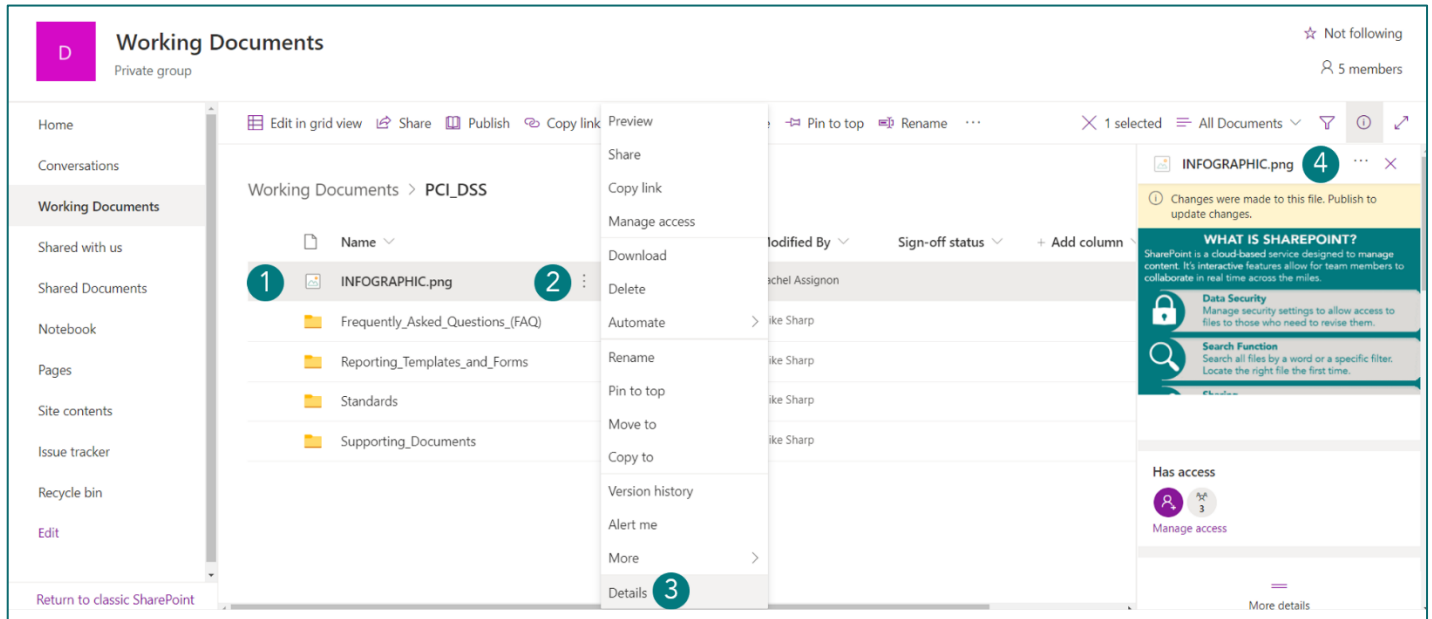


NOTE

An alternative method is to drag and drop file onto desired SharePoint Library or folder (dotted line outline will appear).

TAGGING

Every file that is uploaded into SharePoint is tagged. These tags serve as a way to categorize each file to locate it later. For example, the tags could classify a document as belonging to a specific department or team.

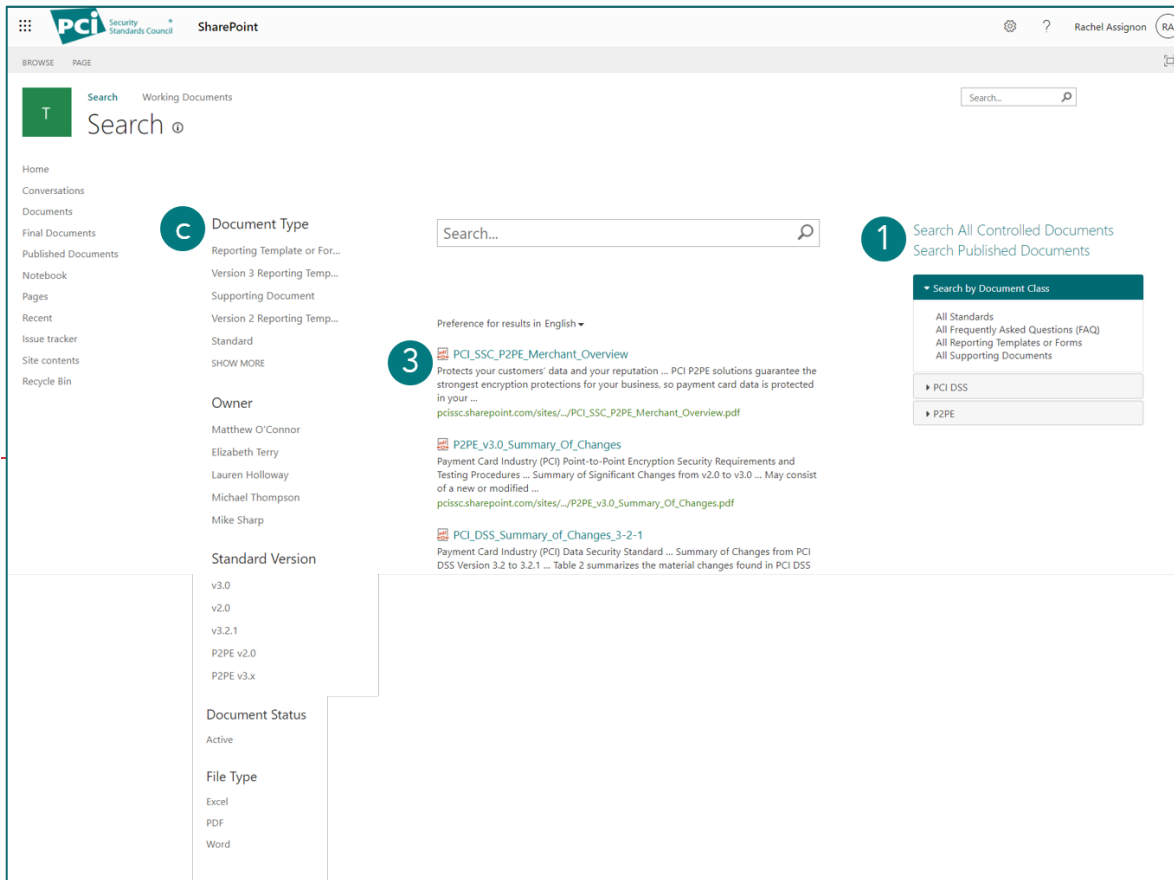


1. Select document
2. Click :
3. Select Details
4. Edit pane opens
 - a. Enter details to tag document
 - b. Standard version (plain text field--assigned)
 - c. Version (assigned by SharePoint when edits are saved)

SEARCH FUNCTION

SharePoint is capable of returning refined search results when looking for a file. Enter any word that is contained within the file to locate the file. SharePoint also has filters to refine the search even further.

REFINABLE SEARCH (METHOD 1)



1. Click on "Search all controlled documents" or "Search published documents"
2. Narrow search by any of the following methods:
 - a. Expand accordion menu on right to select a document type
 - b. Enter word(s) in the search field
 - c. Filters on the left
3. Select the desired file
 - a. Click on VIEW LIBRARY to view it in folder
 - b. Click on link to view the document



NOTE

Some files will open in the same window. Right click to open in new tab.

MODERN SEARCH METHOD (METHOD 2)

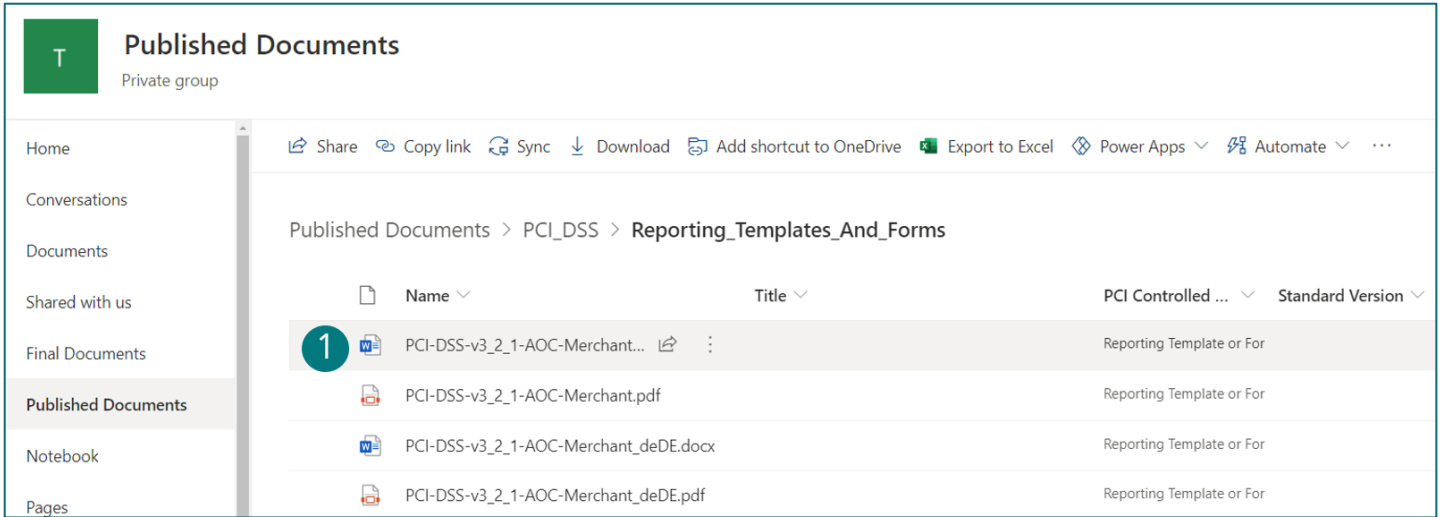
The screenshot shows a SharePoint search results page. At the top left is the PCI Security Standards Council logo and the text 'SharePoint'. A search bar at the top right contains the text 'faq' and is marked with a circled '1'. Below the search bar is an 'Exit search' link. The breadcrumb trail reads 'Organization > Published Documents > Working Documents'. Below this are tabs for 'All', 'Files', 'Sites', and 'News', with 'All' selected. The search results are listed below:

- Item 1 (marked with a circled '2'): A folder icon followed by the title 'Frequently_Asked_Questions_(FAQ)'. The path is 'Working Documents > ... > P2PE'. The author is 'Mike Sharp' and it was modified on December 17, 2020.
- Item 2: A folder icon followed by the title 'Frequently_Asked_Questions_(FAQ)'. The path is 'Working Documents > ... > PCI_DSS'. The author is 'Mike Sharp' and it was modified on December 18, 2020.
- Item 3: A Word document icon followed by the title 'P2PE_v3.0_Standard_04Oct2019_clean'. The path is 'Working Documents > ... > Standards'. The author is 'Mike Sharp' and it was modified on October 4, 2019. The description is 'Initial release of PCI Point-to-Point Encryption: Solution Requirements – Encryption, Decryption, and Key Management within Secure Cryptographic Devices (Hardware/Hardware...'. A thumbnail of the document is shown on the right.
- Item 4: A Word document icon followed by the title 'APP_P2PEv3_P-ROV_22Nov2019_clean_ballot'. The path is 'Working Documents > ... > Version_3_Reporting_Templates_and_Forms'. The author is 'Mike Sharp' and it was modified on November 22, 2019. The description is 'Payment Card Industry (PCI) Point-to-Point Encryption... Template for Report on Validation for use with P2PE v3.0 for P2PE Application Assessments... The tables in this template may...'. A thumbnail of the document is shown on the right.

1. From landing page, enter a search word in search bar at the top of the page
2. Select the desired file

REVISING DOCUMENTS

Edit documents within SharePoint quickly and easily. SharePoint keeps track of changes and marks it as a new version (see Version Control below for more information).



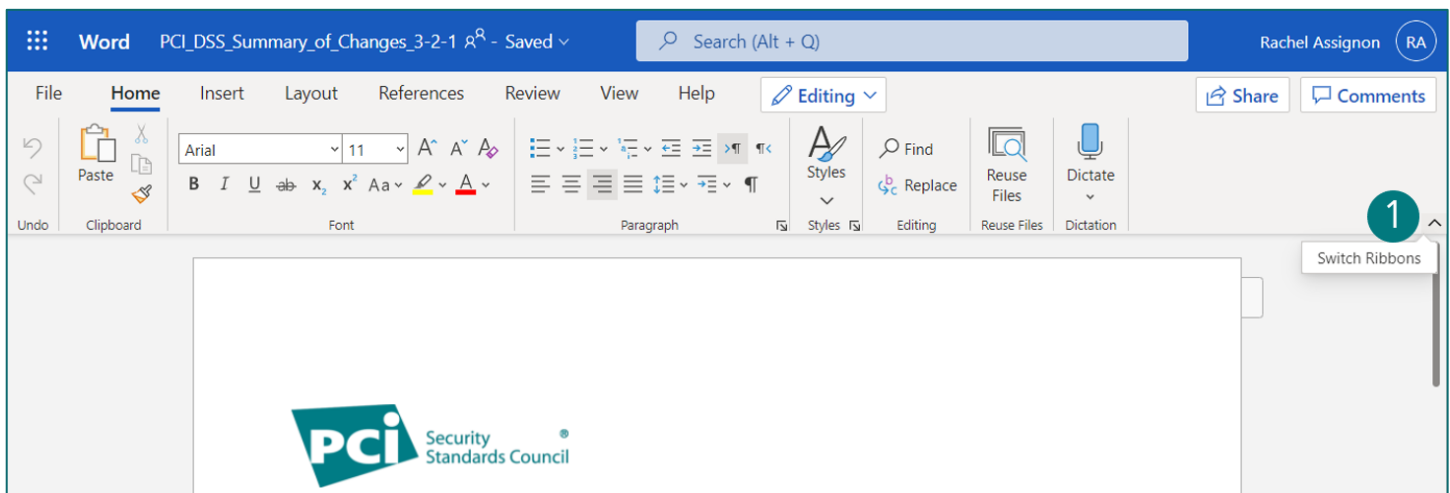
1. Select the desired file and click on the Name.



NOTE

Right-click to open in new tab (file will open in same window)

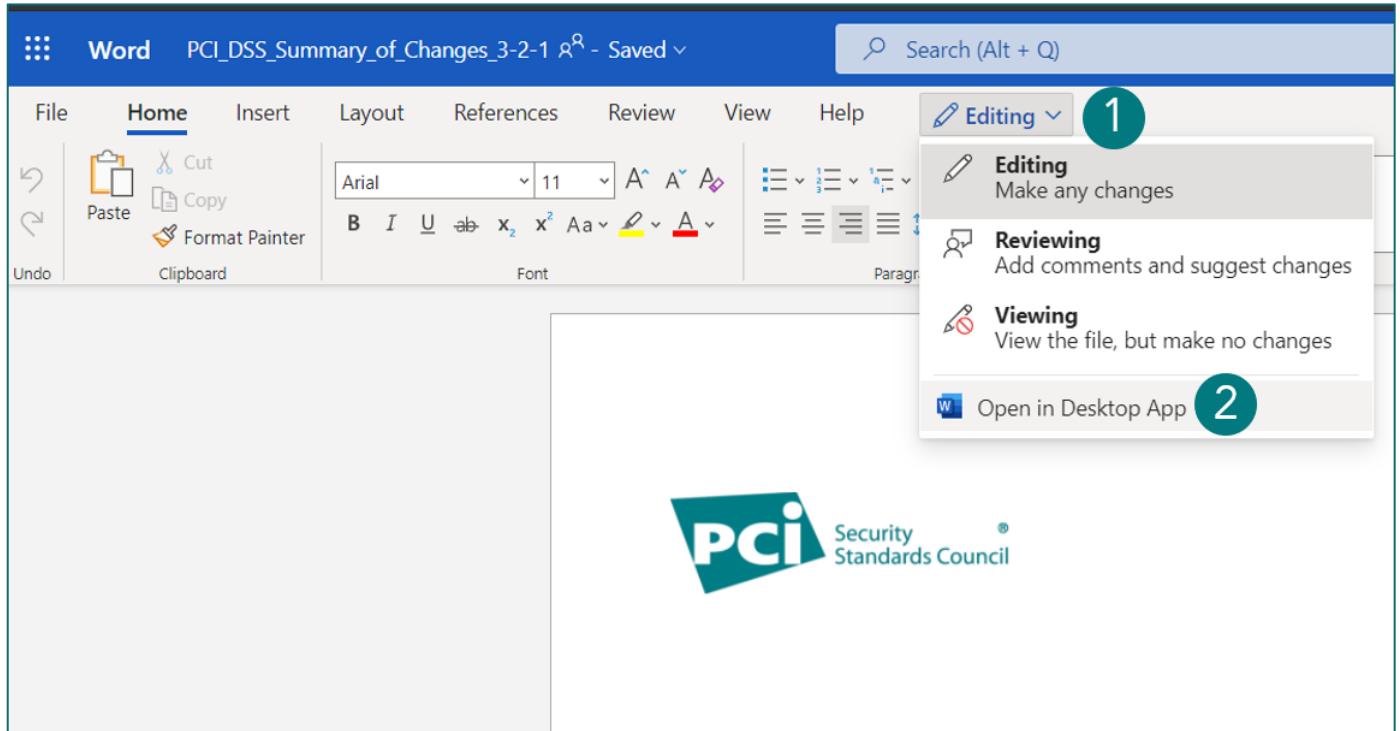
Some features of Microsoft Word, for example, may not appear right away. On the online version, the features are available.



Expand the ribbon of features by clicking on the arrow.

EDITING ON THE DESKTOP

Editing files on the desktop provides a full experience of Microsoft Word, PowerPoint, and Excel. These files are still located within SharePoint but can be edited on the desktop.

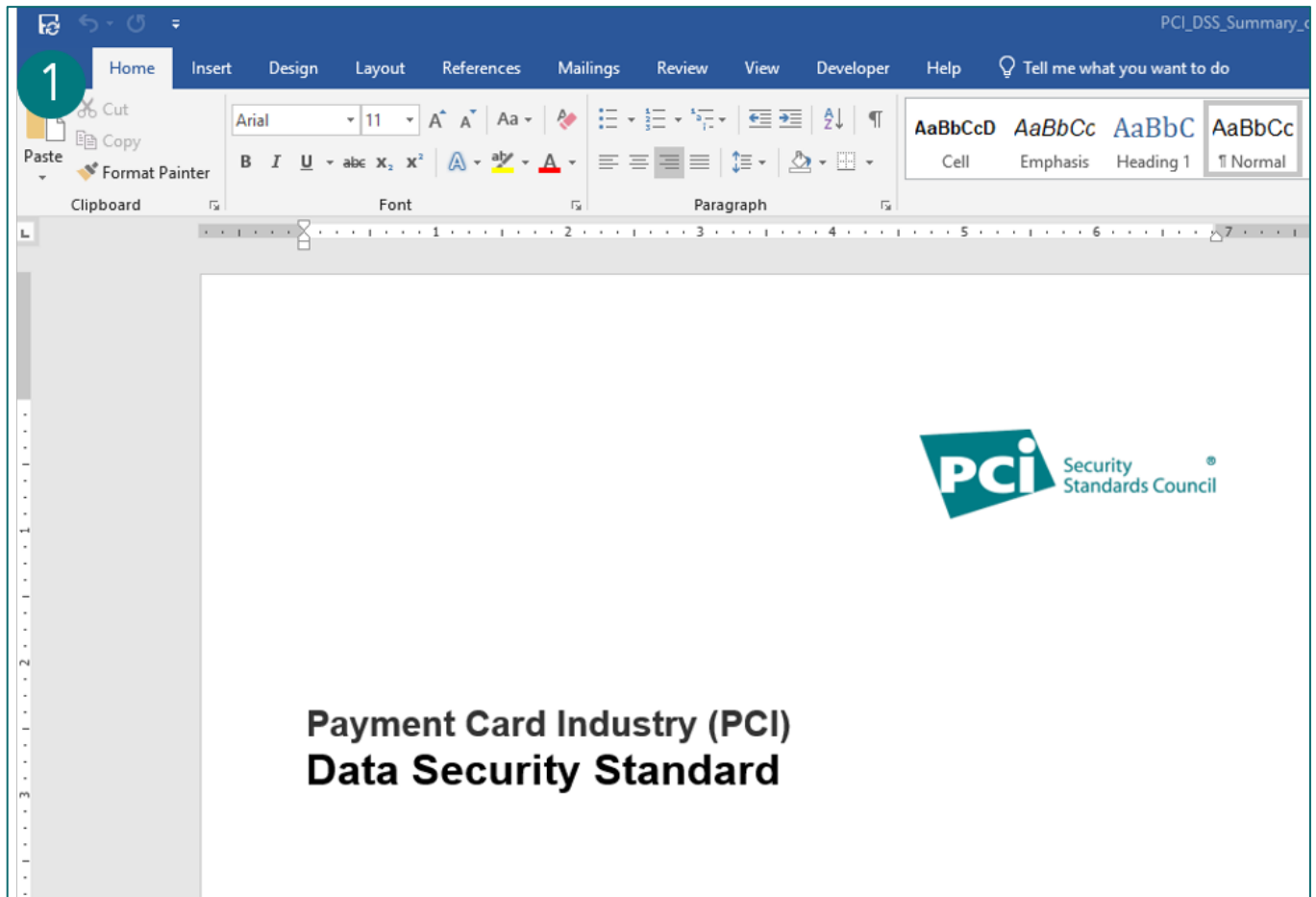


1. Click the Editing drop-down menu.
2. Select Open in Desktop App.

SharePoint will now open the file on the desktop with the full functionality of Microsoft Word (in this example).

SAVING FILES EDITED ON THE DESKTOP

Once the editing of the file is completed, the file can be saved in the same location of SharePoint.



1. Click the Save button

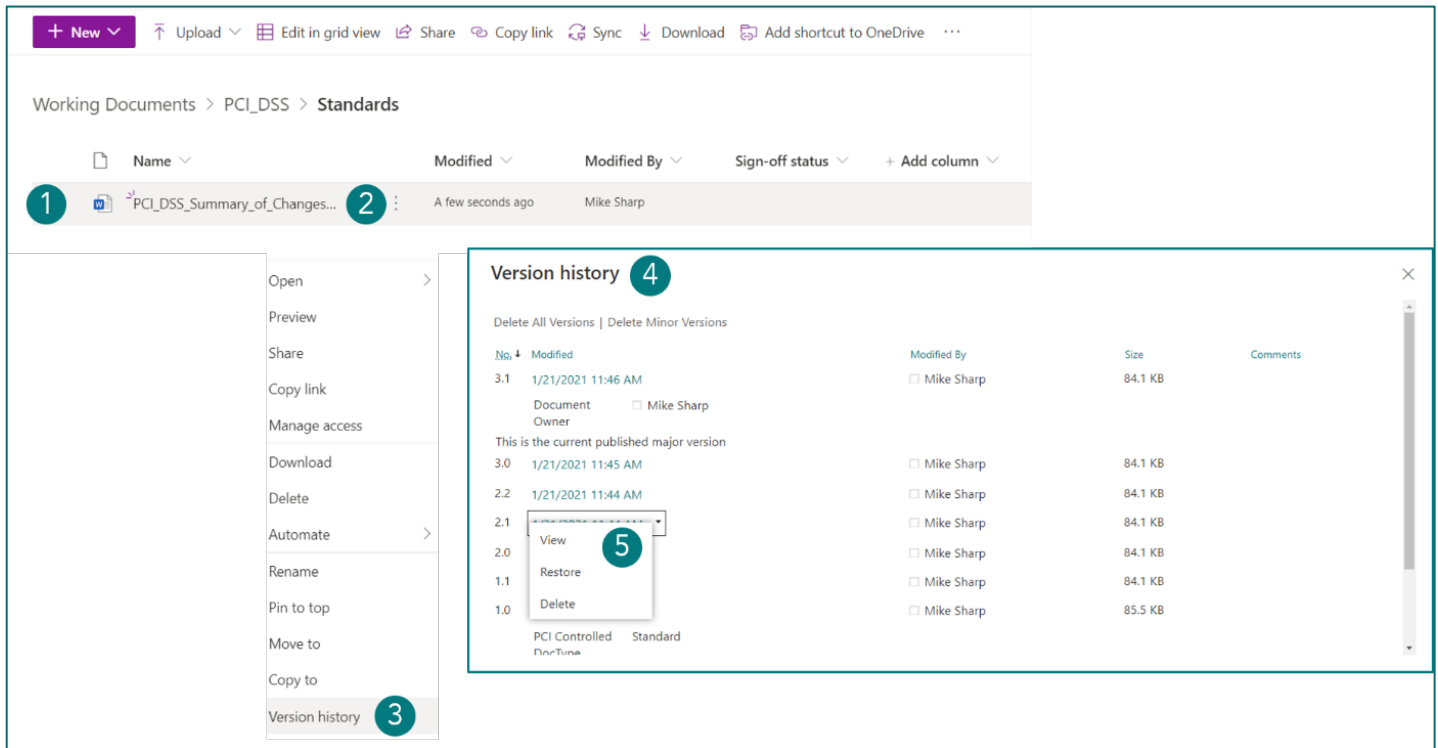


NOTE

To verify that the file will sync in the current SharePoint location, note the Save button has a circle symbol on the bottom right corner.

VERSION CONTROL

Changes to files are tracked by SharePoint. Minor differences are given a new extension to the existing version. Major changes are given a new version number.



1. Locate the desired file.
2. Click on the :
3. Select Version history from the drop-down menu
4. The Version history pane will open
5. With any version, choose to:
 - a. View the version
 - b. Restore that version (overwrites all other versions)
 - c. Delete the version

FREQUENTLY ASKED QUESTIONS (FAQs)

Q: How is a published document in SharePoint different from published document?

A: When major and minor versioning is enabled, a published document in SharePoint is one that has been published as a 'major version.' Users who have read-only access to the document will not see minor versions of the document, and when configured this way, only major versions will show up in Search results.

This is not the same thing as a published controlled document, which is a special type of document that has a specific approval and publishing process. A published controlled document has been approved by the document owner in a workflow and has been placed on the Published Documents site. It is a copy of working document.

Q: Are files in SharePoint published directly to the public website?

A: No, SharePoint is a site to manage internal content and collaborate internally with colleagues on files. Once a Controlled Document is published, it is manually moved to the public website when appropriate.

Q: How far back does versioning go?

A: SharePoint is set to keep 500 previous versions, but can be configured to keep more as needed.

Q: If I tag a file in SharePoint, will that affect the properties on the website (document library)?

A: No, the tags on a file is internal to SharePoint for searching purposes. The tags do not automatically carry over to the files published on the website. Currently some of the tags will be manually implemented when a document is moved to the public web site.

Q: Can I work in a document at the same time as someone else?

A: Yes. You can even view who is in the document and where they are in the document. This makes collaboration easy.

Q: Can I edit a document if I am not the owner?

A: If you have been given access to the file, you can edit and make other types of revisions to the document.

