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SharePoint Log In

URL
Enter this URL in the address bar.

Browser
Firefox and Chrome are preferred.

Credentials
Username: @siue.edu email address
Password: e-ID password

Sign in
Click to Sign in.
Request a Site

**Site Name**
Name your site.

**Site Description**
Briefly describe your site.

**Site Collection**
Select the collection where the new site will be housed.

**Site Request**
Click **Site Request** under the **Information** section to view the site request form.

**Site Template**
Select **Standard Template**.

SharePoint Quick Reference Guide for Site Admins
Request a New Site: Add Users

Security Groups
Add users to the site with different permission levels.

- **Site Admins**
  - Admins have the permission to add/remove users to the site, upload/download/delete documents, lists and discussion items. They can also edit the look and navigation of the site.
  - Enter eID
  - Add
  - Remove

- **Site Assistants**
  - Assistants have the permission to upload/download/delete documents, lists and discussion items. They cannot add/remove users.
  - Enter eID
  - Add
  - Remove

- **Site Members**
  - Members have the permission to upload/download documents, and post to lists and discussions. They cannot delete content from the site.
  - Enter eID
  - Add
  - Remove

- **Site Visitors**
  - Visitors have the permission to view the site and download documents. They cannot upload content or post to the discussions.
  - Enter eID
  - Add
  - Remove

Add Users
Determine the level of access the user should have (Admin, Assistant, Member, Visitor), enter their eID in the appropriate box and click add.
View Your Sites

There are two ways to view your sites:

- **Click My Sites** in the left navigation.

- Your list of sites is shown on your SharePoint home page each time you log in.
SharePoint Quick Reference Guide for Site Admins

Customize Your Site

Site Contents
Click "site contents."

Add an App
Click to add a new list, library, discussion board, survey, etc.
Announcements
Post important messages on the home page of the site.

**New Announcement**
Click to add a new announcement.

**Announcements**
Click to manage announcements.

**Edit Announcement**
Click the 3 dots (more options) to edit or delete an announcement.
Links
Add links that are relevant to your page or project to allow for quick access to those sites.

- **New Link**: Click to add a new link.
- **Pinned**: If you click **Pinned** when adding a link, the link will show up on the site home page for easy access.
Links
Add links that are relevant to your page or project to allow for quick access to those sites.

**Edit a Link**
Click to edit the link.
Tasks
Build a project plan with tasks. Assign tasks to individual people, set due dates, create subtasks and add predecessors.

**Complete a Task**
Check the box to mark the task complete.

**Edit Task**
Click the 3 dots (more options) to edit, delete, add to timeline or create a subtask. Also use this to attach a file to the task.

**New Task**
Click to add a new task.

**Tasks**
Click to access the task list.
Tasks
Build a project plan with tasks. Assign tasks to individual people, set due dates, create subtasks and add predecessors.

List Alerts
To receive an alert on changes to any task in the list, click List from the top menu bar then click Alert Me.

Specific Task Alerts
Select a task from the list then click the Tasks tab at the top. Click Alert Me to receive an email or text when that task is modified and meets your alert criteria.

Change Your View
Click the 3 dots (more options) to view a Gantt Chart, late tasks or other custom view.

All Tasks
This is the default view.

Calendar
View tasks on a calendar.

Completed
View only completed tasks.
**SharePoint Calendars**

Manage site specific events on a site calendar.

**Event Alerts**
To receive an alert on changes to a specific event, click the **specific event** on the calendar. Next, click **Events** from the top menu bar then click **Alert Me**.

**Connect to Outlook**
To sync the SharePoint calendar to your Outlook calendar, click **Connect to Outlook**.

**Calendar Alerts**
To receive an alert on changes to the calendar, click **Calendar** from the top menu bar then click **Alert Me**.

**Calendar**
Click to view Calendars.

**Add Event**
Click a date to add an event.

**Edit an Event**
Click an existing event to edit.
Document Library: Library Settings and Syncing

Library Settings
Change library name, permissions, versioning, etc.

Sync
Click Sync to create a synchronized copy of this library to your computer.
Document Library: Adding New Documents

- Drag to Upload: Drag a file onto the screen to upload.
- Libraries: Click the **specific document library** you wish to view.
- Add Document or Folder: Click **New** to add a document or folder.
Documents: Check Out/In

Check Out
We recommend users use the Check Out feature when multiple people are collaborating on the same documents. A checked out document is not editable by others until it's checked back in.

Advanced Options
Click Advanced to view more options.

Document Options
Click the 3 dots (more options) to view document options.
Documents: Editing

**Open**
Click the file name to open the document to edit it in the browser.

**Open in Excel**
Opening the document in Excel will open the desktop version of Excel. When you are done editing, use the standard File > Save to save your changes back to SharePoint. You can also save the document locally then manually upload a new version.

**Open in Excel Online**
Opening the document in Excel Online will allow you to edit the document online. The document automatically saves every few seconds and when you close it, the new version will overwrite the old version of the document.

**Multiple people can edit the same document at the same time as long as the file is not checked out. When you open the file, you will see who is currently editing the document at the bottom:**

**Document Options**
Click the 3 dots (more options) to view document options.
Documents: Version History and Linking

**Version History**
Click to view previous versions of the document.

**Document Options**
Click the 3 dots (more options) to view document options.

**Get a Link**
Click to get a link (URL) to the document. You can share this link with people who have access to the site. The link would bring the user directly to the document.
Modify Lists and Libraries

Modify View
Click **Modify View** to add/remove columns that display on the screen for any list or library. You can also change the order of the columns on the screen as well as filter and sort the list.

Columns
Choose which columns to show/hide

Position
Define the order of columns.
Tools

Click **Tools** to access tool options.

**User Management**
Site Admins will use this to manage user permissions for their site as well as add/delete users.

**Email Users**
Send emails to users or groups of the current site.

**Update Navigation**
Change the order of the quick navigation bar on your site, change list and library titles, restrict audience, etc.
Tools: User Management

User Management
Site Admins will use this to manage user permissions for their site as well as add/delete users.

Security Groups
Add users to the site with different permission levels.

Add Users
Determine the level of access the user should have (Admin, Assistant, Member, Visitor), enter their eID in the appropriate box and click add.

Remove Users
Select a user’s name and click remove.

SP_Training_s000425 Admins
Admins have the permission to add/remove users to the site, upload/download/delete documents, lists and discussion items. They can also edit the look and navigation of the site.

SP_Training_s000425 Assistants
Assistants have the permission to upload/download/delete documents, lists and discussion items. They cannot add/remove users.

SP_Training_s000425 Members
Members have the permission to upload/download documents, and post to lists and...
The Recycle Bin is located in Site Contents. Site admins have 30 days to recover deleted items. For further assistance recovering deleted items, contact sharepointadmin@lists.siu.edu.
Search Sites

Search Scope
Select the scope of your search.

Search
Type a search keyword into the Search this site box, click the down arrow to select a search scope, and then click the search icon.
Additional Resources

**ITS Help Desk:** 650-5500

**Login to SharePoint:** SharePoint.siue.edu

**ITS SharePoint Resources Page:** siue.edu/its/sharepoint

**ITS KnowledgeBase:** kb.siue.edu

**Microsoft Resources:** support.office.com/en-US/SharePoint

**ITS SharePoint Administrator:** sharepointadmin@lists.siue.edu

**ITS Help Desk:** help@siue.edu

**ITS Trainer:** itstraining@siue.edu