Inside Loyola/SharePoint Upgrade

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Purpose of this guide
This guide is an overview of the changes and the most important new features in the latest version of SharePoint, the platform for the Inside Loyola portal and team sites. It is intended for current Inside Loyola and team site users and owners/administrators.

Overview
Loyola has upgraded Microsoft SharePoint, a web-based software platform. SharePoint is the platform that is used for the Inside Loyola portal (https://inside.loyola.edu), as well as for team sites. With this latest upgrade, you will notice significant changes, including:

- Brand new look and feel (cleaner looking, more white space)
- New menu options in the top right of the page:
  - Newsfeed, One Drive, Sites
    - Newsfeed - follow people, documents, sites, or tags
    - One Drive - store private organizational documents for mobile use when you’re not online in SharePoint
    - Sites - see a list of sites you are following, suggest new sites to follow
- Improved document management functionality:
  - Drag and drop files more easily
  - New options for file management — such as edit, delete, download, share and follow — using the new "Call out" (...) menu
  - Easily create views and edit list items inside a page
- Updated Microsoft Office web applications that work on mobile devices
- New ways of accessing some of the features you use now, like Site Settings
  - Site Settings is now located in the gear icon
- Improved Search functionality that will allow you to preview the search result by hovering over the item

Supported Browsers
The new SharePoint supports several commonly used web browsers, such as Internet Explorer, Google Chrome, Mozilla Firefox, and Apple Safari. However, certain web browsers could cause some SharePoint functionality to be downgraded, limited, or available only through alternative steps. Internet Explorer is the recommended browser for the best functionality.

For more detailed information about supported browsers, visit Microsoft’s browser support website.

For information about Mobile Device browsers supported, visit Microsoft’s mobile device browser page.
Changes to the Inside Loyola Portal

Old Layout vs. New Layout

The new Inside Loyola portal looks similar to the previous version, but features a new ‘fly-out’ menu for navigating the site, small design changes, and new menu options.
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New Menu Options and Features
One of the biggest changes on the Inside Loyola portal is the new menu in the top-right corner. The new options in this menu can help you navigate through the site, simplify certain tasks (like sharing your team site), and keep you up-to-date on changes that are made on your sites, documents and libraries.

Old Layout

New Layout

What’s New
- **Newsfeed** - A new social feature that keeps you informed. You can view conversations among co-workers, as well as follow content and changes on any sites or documents you are interested in (learn more on Microsoft’s website).
- **OneDrive (for SharePoint)** - A new feature of Inside Loyola that allows you to store your own university files separate from other team sites you may be part of. You will be able to share and collaborate on files with colleagues and friends at Loyola, as well as work offline and sync your documents when you’re back online.
- **Sites** – A new social feature that helps you keep track of sites you are interested in. It lists all the sites you are following and suggests other sites that you might find interesting.
- **Settings** - The menu known as Site Actions in the previous version of SharePoint has moved to the top-right corner of the screen. It's represented by the "gear" icon and is now referred to as Settings.
- **Help** – A searchable Microsoft SharePoint Help menu.
- **Share** – A new way to quickly share documents or sites. You can invite people to share specific documents and control what they can do with them (read, edit, and so on).
- **Follow** – A new social feature that lets you follow a site and get back to it easily from your Sites page. This is useful when you need to know about any changes made to a site or document.
- **Notifications** – A new feature that will show you any Colleague notifications that have occurred since your last log in (this is typically for students, i.e. if a bill is due).

Where did the previous menu items go?
- **Webmail** can now be accessed through the Access to Loyola Email web part.
- **Student Directory** and **Employee Directory** are now found under the Quick Links web part.
- **Help** (for Inside Loyola) moved to the left of the Newsfeed option.
- **Sign Out** moved to the drop-down menu for your user profile (this is the tab with your name in the upper right).
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Navigation Fly-out Menu
The horizontal Navigation menu is replaced by a fly-out navigation menu. To view the menu, click on or hover the mouse over Menu in the top left hand corner.

Old Menu

New Menu

Changes to Website Design

Quick Links and Applications are now located side-by-side in the same web part. You can toggle between the two menus by clicking on the Title tab. The active menu title appears in green.

My Team Sites displays all of the team sites you are a member of by category. The two differences are: (1) the team sites categories are different and (2) you cannot collapse and hide the team sites by category as before.

The previous team site categories were: Department, Organization, Other

The new team site categories are: Departments, Clubs and Organizations, Committees, Other
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Changes to My Team Sites
In the new SharePoint team sites, you will notice a few changes in the layout, most significantly:

- The new menu in the upper right corner
- The Site Actions menu has moved to the new gear Settings menu

Additionally, you can perform all the same tasks as before, but the interface and steps are simpler.
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New Settings Menu

The menu known as **Site Actions** in the previous version of SharePoint has moved to the top-right corner of the screen. It's represented by the "gear" icon and is now referred to as **Settings**.

Settings is a drop-down menu of options that will vary depending on your permission level. Site Owners/Administrators will have familiar options, like editing a page, as well as new options, like adding an app. An ‘app’ is a new term that includes everything from specialized lists (like Announcements, Calendars, Discussion boards, Links and Tasks) to web parts.

Settings Menu Overview

- **Show Ribbon** - Show/hide the ribbon menu
- **Shared with** - See who has access to your team site, share your team site with others, email team members, and set permissions
- **Edit page** – Change the page layout: drag and drop, add or remove web parts
- **Add a page** – *Not available at this time*
- **Add an app** - Add a specialized list or web part to a team site
- **Site contents** – View all the content on your team site; add subsites
- **Design Manager** – *Not available*
- **Site settings** – List of available customizations for your team site

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Select Settings menu options in more detail

Show (or hide) the ribbon menu

Click the gear 🛠️, then **Show (or Hide) Ribbon** from anywhere inside a team site.

Remember that the ribbon menu is contextual, meaning it will change depending where you are in the site. For example, the Document Library contains a **Files** and **Library** tab in addition to the **Browse** tab.

See who has access to your team site and manage members and permissions

From your team site, click the gear 🛠️, then **Shared with...**

This will display a list of everyone with access to the team site you are on and other options:

- To add someone to your team site, click **Invite People**
- To email all member of the team site, click **Email Everyone**
- **Advanced** allows you to view and edit permissions, as well as add, delete and edit access to the team site.

Edit a page (add a web part) on your team site

From your team site, click the gear 🛠️, then **Edit page**.

Note: When editing a team site, the team site will be automatically ‘checked out’ to you. This will prevent other site owners from making changes at the same time.

1. Click on **Add a Web Part** to add a new web part to your page.
2. Select the type of web part (i.e. Announcements), then click **Add**.
3. Relocate web parts by dragging and dropping them. *(Note: Only Internet Explorer works for drag & drop)*
4. Click **Save** to save your changes.
5. When you are ready to make the page available to others, click **Check it in, Continue**, then **Publish this draft**.
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Undo changes when editing a page
If you would like to undo all changes made while editing a page, use the **Discard Check Out** option:

1. While editing a page, click on the **Page** tab in the ribbon.
2. Click the drop down arrow **Supervisor** under **Check In**.
3. Click **Discard Check Out**.
4. Confirm that you would like to exit without saving by clicking **OK**.

The page will be checked back in without saving changes.

Add an app (or list) to your team site
When a team site is created, a template is selected. Depending on the template chosen, your site already has a number of ‘apps’ by default (Announcements, Shared Documents, Links, Calendar for example).

You can add more apps to your site, however. For example, you might want to add an **Issue Tracking** app to your site. **Add an app** allows you to add specialized lists that may not be available on your team site. *(Note: Not all the apps are available at this time.)*

1. From your team site, click the gear **Settings**, then **Add an app**.
2. Choose an app from the list or select **Custom List** to build your own.
3. Fill in the information requested, then click **Create**.
4. If you would like to add the app as a web part in the main content area, follow the directions for adding a web part (above).

Add a subsite
A subsite is a separate site located inside your main team site. It functions similarly to your main team site. It can contain a Shared Documents library, Calendar or other customizable web parts and can inherit the same user and group permissions from the main site. To create a subsite:

1. From your team site, click the gear **Settings**, then **Site Contents**.
2. Scroll to the bottom of the page and click **New subsite**.
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3. Enter a **Title**, **Description**, and **Web Site Address** for the subsite.

   ![Title and Description](image)

   ![URL Name](image)

4. Choose a template from the Ellucian tab; the **Committee** template is recommended.

   ![Template Selection](image)

5. You can choose to use the same permissions as the parent site or you can create unique permissions. By choosing unique permissions you will be taken through steps to set permissions for users.

   ![User Permissions](image)

6. Choose **Yes** or **No** for **Navigation Inheritance**. Using the top link bar to navigate to the subsite is recommended.

   ![Navigation Inheritance](image)

7. Click **Create**.

   It may take a minute for your new subsite to appear. Once it appears, you can make additional edits if needed, by clicking the gear ⚙️, then **Edit Page** (refer to the section above for editing a page.)
New Options for Creating a New File, Editing Files and Uploading Documents

You can now create a new file and edit existing files right in your browser, using Microsoft Office web-based applications (Word, Excel, PowerPoint or OneNote). This is useful if you don’t have these applications installed on your computer.

For uploading documents, you can still browse for the files you want to upload. Or you can use the improved Drag and Drop feature.

Create a New File using Microsoft Office Web Applications

1. From your team site, click on a document library in the quick launch menu.
2. Click + New Document and make a selection (Word, Excel, PowerPoint, or OneNote) to create a new file. (You can also create a new folder or upload an existing file here.)
3. Enter a file name and click OK. The application will then open in the browser window.
4. Work on your document and click Save when done.
5. Click SharePoint 2013 in the top menu or the browser back arrow to return to the SharePoint team site.
6. A “New” icon will now display after the document name.
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Edit a File using Microsoft Office Web Applications
1. From your team site, click on a document library in the quick launch menu.
2. Click on the file you would like to edit.
3. The file will open in the browser window using the Microsoft Office Web Application.
4. Click on **Edit Document**, then **Edit in Word** (or other app) **Web App**.
5. Click **File**, then **Save**.
6. Click on **SharePoint 2013** in the top menu (or the browser back arrow) to return to the SharePoint team site.

Upload Documents using Drag and Drop
Video: Adding Files to a Library

1. From your team site, click on a document library in the quick launch menu.
2. Search your desktop or Windows Explorer (the yellow folder icon, where your files are stored).
3. Drag a document (click and hold the mouse) to the browser and drop it (release the mouse button) when you see the **Drop here** box appear.

Upload Documents by Browsing
1. From your team site, click on a document library in the quick launch menu.
2. From the ribbon menu, click on the **Files** tab.
3. Click on **Upload Document**.
4. Click **Browse** and select your file.
5. You also have the option to choose the **Destination Folder** to store the document.
6. Click **OK**.

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Working with Documents and Folders in Shared Documents Library
You can edit documents in SharePoint using either the Check Out or Co-Authoring option.

- The Check Out option ensures that no one can make changes to the document while you have it checked out.
- The Co-Authoring option allows 2 or more people to edit a document simultaneously and see the changes as they occur.

Edit a Document using the Check Out Option
1. From a shared documents library inside your team site, click to the left of the file name to place a check mark next to it.
2. From the ribbon menu, click on Files, then click Check Out.
3. Click on the file name to edit.
4. Choose either Edit in Word (or other Office App) or Edit in Word Web App. Save your file when done.
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a. If you edit and save the file in Word, check in the document inside of Word by clicking **Check In**.

b. If you edit and save the file in the Word Web App, click the call out ... menu to the right of the file name and click **Check In**.

5. Enter type of version and/or comments and click **OK**.
Edit a Document using Co-Authoring

As an alternative to the Check-Out option, you can collaborate on Documents using Co-Authoring. This will allow you to see the changes live as they occur and allow collaboration on any of the Office programs (Word, Excel, PowerPoint). It will list at the bottom who is currently editing the document.

To Co-author a document:

1. Start first by navigating to the document in SharePoint and opening it in the Microsoft Word (or other Office app) web app.
2. When another user is working in the document it will lock the paragraph they are working on and you can work in a separate paragraph.

Video: Co-authoring in SharePoint on Lynda.com

Move a file by dragging and dropping it (Note: You must use Internet Explorer for this drag and drop)

1. From your team site, click on a document library in the quick launch menu.
2. Click and hold the mouse button on the file you want to move and drag it to the folder you want to move it to.
Delete a file

1. From the document library, click on the Files tab to open the ribbon menu.
2. Click to the left of the file you want to delete to add a check mark.
3. Click on Delete Document from the ribbon menu.

![DELETE FILE](image)

Rename a file

1. From the document library, click on the Files tab to open the ribbon menu.
2. Click to the left of the file you want to rename to add a check mark.
3. Click on Edit Properties from the ribbon menu.
4. Enter the new name.
5. Click Save.

![RENAME FILE](image)

Video: Renaming, deleting and adding files within a library
Recover a Deleted File from Trash

If you accidentally delete a file, you can retrieve it before losing it permanently. Files are stored in the Recycle Bin for 30 Days before being deleted.

1. Click Settings/ the gear icon in the top right hand corner, then click Site Contents. The Site Contents window will open.
2. Click on Recycle Bin in the top right.
3. Add a check mark beside the document you want to restore.
4. Click Restore Selection, then click OK.

This will remove the item from the Recycle Bin and put it back where it was.
Set an Alert or Manage Alerts for the Document Library or for a Specific Document
You can set an automated email alert to go to designated users whenever a document library or specific document is updated.

To set an alert on a document library (and receive email notifications when any document in the library is changed):

1. Navigate to the shared documents library where you want to set an alert.
2. From the ribbon menu, click the Library tab.
3. Click Alert me.
4. Click Set alert on this library.
5. Enter the name(s) of the person(s) to be alerted (and any other preferences, such as the delivery method or the frequency).
6. Click OK.

To set an alert for a specific document (and receive email notifications when a specific document is changed):

1. Navigate to the shared documents library.
2. Click to the left of the appropriate document to add a check mark next to it.
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3. From the ribbon, click **Files**, then click **Alert Me**.

4. Click **Set alert on this document**.

5. Enter the name(s) of the person(s) to be alerted (and any other preferences, such as the delivery method or the frequency).

6. Click **OK**.

To manage the alerts you have set for documents or folders:

1. From the ribbon menu, click **Library**.

2. Click **Alert Me**.

3. Click **Manage my Alerts**.

4. To create a new alert, click **Add Alert**

5. To delete an alert, check the box next to the alert you wish to delete and click **Delete Selected Alerts**.
Use the Calendar

Add an Event to a Calendar

Video: Adding events to a calendar

1. Navigate to the calendar by clicking Calendar on the quick launch menu on the left side.
2. Hover over a date and click Add.
3. Enter the details for a new event.
4. Click Save.

You can now connect your SharePoint calendar to Outlook to view this information along with your personal calendar information.

1. Navigate to the Calendar and click the Calendar tab.
2. Click Connect to Outlook.
3. Click Allow when asked whether to allow this website to open a program on your computer.
4. Click Yes when asked whether to connect this calendar to Outlook.

Create or Modify a Task and Connect it to Outlook

To create a new task:

1. Navigate to Tasks from the quick launch menu on the left.
2. Click + New Task.
3. Give the task a title, assign it to a user (or users), assign a start date and end date.
4. Click Save.
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An email will be sent to the person or group the task is assigned to.

To connect SharePoint tasks to Outlook:

1. From the Tasks list, click to the left of the appropriate task to place a check mark next to it.

2. Click the List tab on the ribbon menu.
3. Click **Sync to Outlook**.
Follow or Bookmark Sites, Document Libraries, and Documents

Follow a SharePoint web site that interests you so you can find the site easily in your list of followed sites, and to see activity from the site feed in your own newsfeed. This video tutorial on Following a SharePoint site will walk you through the process.

To follow a Site:

1. Navigate to the site you want to follow.
2. Click Follow.

From any web page in SharePoint, click on Sites to see a list of the sites that you are following. Click on the link to open a site or a document.

You will receive notifications anytime there is a change. These help you stay up to date with your projects, documents, sites, and the people you work the most with.

You can also Follow People in your organization to stay up to date on their activities and things they are working on in SharePoint. Click on the Follow button on any page, document or search result to follow and be notified of any changes.

To follow people:

1. Click on Newsfeed in the upper right menu.
2. Click on the number above “people”.
3. Click on follow.
4. Enter name(s) of people you want to follow.
5. Click Follow.
Granting User Permissions and Rights / Sharing Content

Video: Understanding permissions in SharePoint

Now you can easily assign permissions to sites or documents by clicking Share and then selecting the proper permissions level you would like the user to have.

1. Click on the icon at the top right of the team site.
2. Enter the names of the individuals you would like to share the site with.
3. Click Show Options to set permission level (Read, Contribute, or Full Control) from the drop-down menu.
4. You may also check or uncheck the box to send an email to notify the individual(s).
New Search Features
There are improvements to the Search feature, including how you filter your search results and the new Preview feature.

Preview Search Items
One of the most notable improvements to the upgraded SharePoint environment is that you can preview documents or websites by hovering the mouse over the search item. A fly-out window will appear showing you a preview of the document or website. This will allow you to preview the search items quickly and decide whether to click the links to go directly to them.

Narrow/Broaden Search
An important difference in the new search feature is that the default search filter is different depending on whether you are searching from the Inside Loyola home page or a team site. When searching from the Inside Loyola home page, the search feature will automatically search everything. When searching from a team site, the search feature will automatically search the current site only. You can expand or narrow the search results if desired.
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To expand or narrow the Search:

1. Enter your search term(s) in the search box.
2. Click on the drop-down arrow to the right of the search box.
3. Select Everything, People, Conversations, or This Site from the drop-down.
4. Click return or the magnifying glass.

If you select Everything, the Search results will include results found on both Inside Loyola and Loyola.edu.

Alternatively, from the Search page, you can narrow or broaden your search by selecting the drop-down menu, next to “Results found in StaffAdmin (or applicable group)”. 
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OneDrive (for SharePoint)
Sync document libraries to your computer using OneDrive for SharePoint

OneDrive for SharePoint is a new feature of Inside Loyola that allows you to store your own university files separate from other team sites you may be on. Consider it your own document library. You will be able to share and collaborate on files with colleagues and friends at Loyola, as well as work with files offline for uploading later. This is particularly useful for laptops that are used while disconnected from Loyola's network, such as when traveling. Note: This will not sync with your Office 365 OneDrive account at this time.

Additional Information
- Lynda.com has excellent online video courses on SharePoint for beginners through advanced users. You can watch an entire course or just select the video tutorials on one specific topic. Log in to the Loyola Portal and click on “Online Learning with Lynda.com” under Applications.
- The Inside Loyola Upgrade page provides links to online training resources and will be updated as new resources become available.
- Specific questions can be directed to the Help Center at x5555 or by emailing ots@loyola.edu