



# Training Guide

## SharePoint Admin Training Manual

*Prepared for*

**African Commission on Human and People's Rights (ACHPR)**

June, 2024

Version 1.0

*Prepared by*

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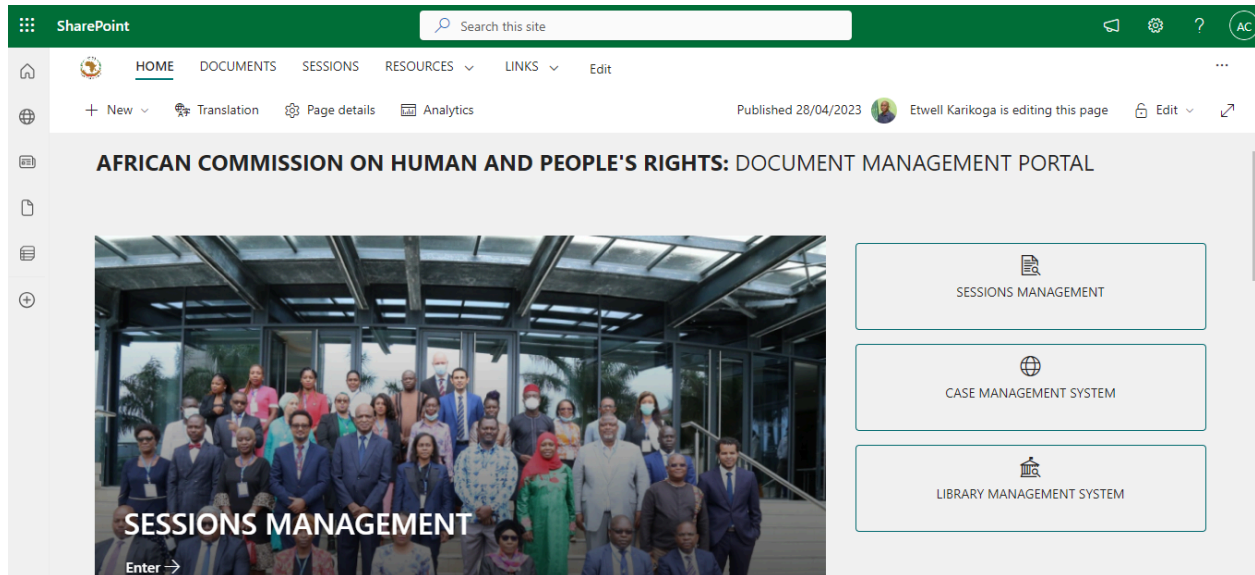
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# 1 Introduction to SharePoint

SharePoint Server is a platform used to securely store, organize, share, and access information from almost any device.



## 1.1 SharePoint Products

- SharePoint Server Organizations can deploy and manage SharePoint Server on-premises. It offers additional features and capabilities, such as Enterprise Content Management, business intelligence, enterprise search, personal sites, and Newsfeed.
- SharePoint Online A cloud-based service, hosted by Microsoft for businesses of all sizes. Instead of installing and deploying SharePoint Server on-premises, any business can subscribe to an Office 365 plan or to the standalone SharePoint Online service. Your employees can create sites to share documents and information with colleagues, partners, and customers.
- OneDrive for Business Sync A desktop program that you can use to sync documents from a team site or OneDrive for Business to your computer for offline use.

## 1.2 Training Requirements

- Laptop or desktop connected to the ACHPR network
- A web browser such as Microsoft Edge, Internet Explorer 11, Internet Explorer 10, Latest Chrome version, Latest Firefox version and latest Apple Safari version

## 1.3 ACHPR

SharePoint has been introduced into the ACHPR as a tool for collaborative tasks on files and documents. SharePoint is not a file storage system.

## 1.4 SharePoint Terminology

|                                |                                                                                                                                               |
|--------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------|
| <b>SharePoint Site</b>         | The SharePoint site is the overall ACHPR SharePoint site from which department and team sites are created.                                    |
| <b>Primary Site Collection</b> | Each team or department site is a site collection.                                                                                            |
| <b>Subsite</b>                 | A team site within an existing primary site collection.                                                                                       |
| <b>Library</b>                 | A library can be created to hold a certain type of file or document or relate to a particular project or task.                                |
| <b>Folder</b>                  | Folders can be used to group documents and files.                                                                                             |
| <b>Permissions</b>             | These are set by the Site Owner and will determine what libraries, folders or documents a SharePoint user can share, edit or view.            |
| <b>Collaboration</b>           | Sharing work in SharePoint. Most collaboration will be on shared documents where several SharePoint users may be updating the same documents. |
| <b>Document Sharing</b>        | To share a file or document with a SharePoint Admin for collaborative working or just to view the content.                                    |
| <b>SharePoint End Admin</b>    | Everyone who has permissions to use the content of a site, other than the Site Owner.                                                         |

|                            |                                                                                                                                                 |
|----------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>SharePoint Calendar</b> | A shared calendar for everyone in the SharePoint team to view.                                                                                  |
| <b>SharePoint Tasks</b>    | 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. |
| <b>Contacts</b>            | Shared contacts for everyone in the SharePoint team to use. Can be exported and used in Outlook if required.                                    |
| <b>Ribbon</b>              | A context sensitive menu bar which appears at the top of a SharePoint page.                                                                     |
| <b>SharePoint Page</b>     | A SharePoint screen of information.                                                                                                             |
| <b>Lists</b>               | A list of contacts or tasks within SharePoint.                                                                                                  |

## 2 Understanding the SharePoint Interface

- Log into the SharePoint Portal by typing in <https://africaunion.sharepoint.com/sites/ACHPRDMS> in the browser address bar
- Press the enter
- The browser should load the image the below

SharePoint

Search this site

HOME

DOCUMENTS

SESSIONS

RESOURCES

LINKS

Edit

+ New

Translation

Page details

Analytics

Published 28/04/2023

Etwell Karikoga is editing this page

Edit

AFRICAN COMMISSION ON HUMAN AND PEOPLE'S RIGHTS: DOCUMENT MANAGEMENT PORTAL



SESSIONS MANAGEMENT

Enter →

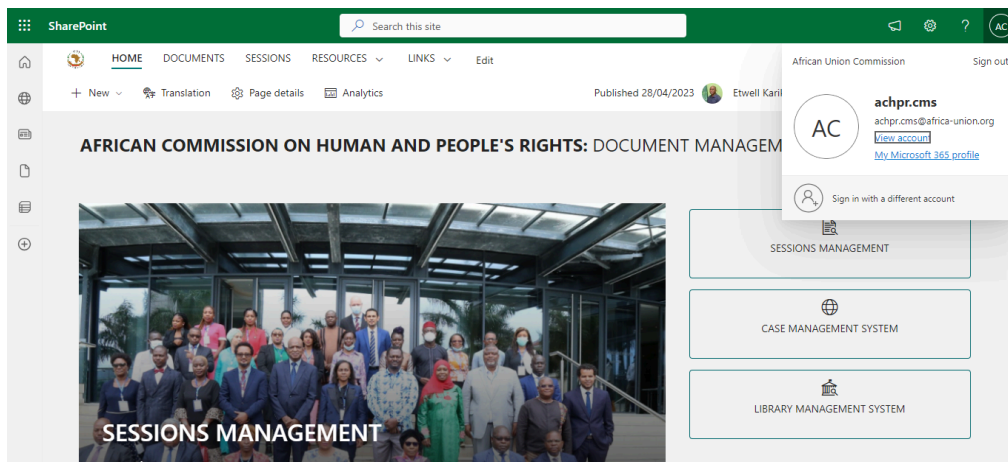
SESSIONS MANAGEMENT

CASE MANAGEMENT SYSTEM

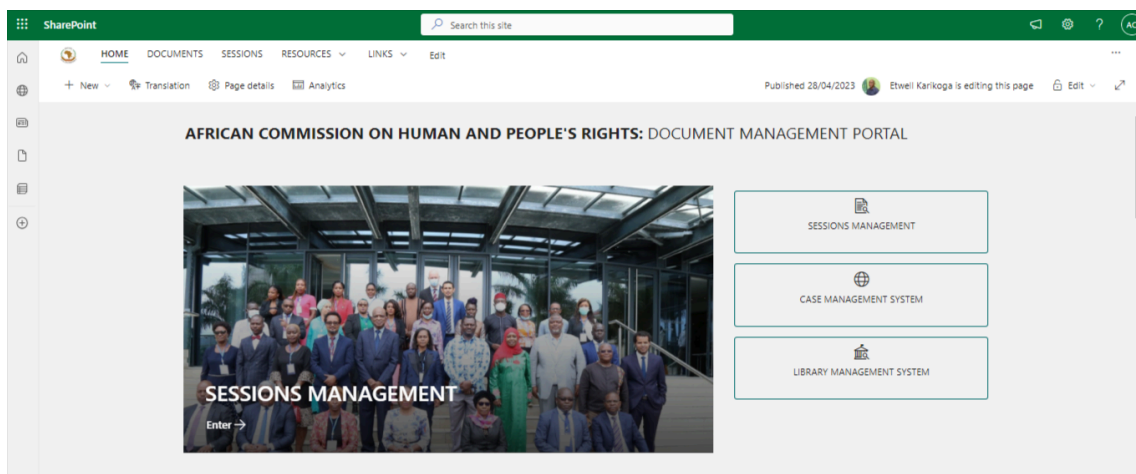
LIBRARY MANAGEMENT SYSTEM

## 2.1 Logging out SharePoint

- Click on your user name at the top right-hand corner of the SharePoint team site window
- Click Sign out
- Close your browser



## 3 Introduction to your new SharePoint Site



### 3.1 What is available on the home page

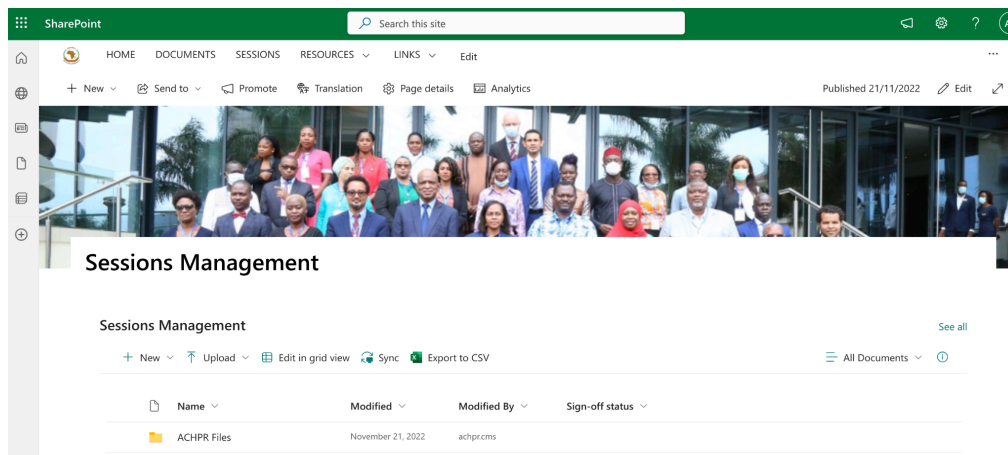
When you get your new SharePoint site, most of the features you need to use will already be there. As you will see from the top navigation menu, you have:

- **Documents**
- **Sessions**
- **Resources**
- **Links**

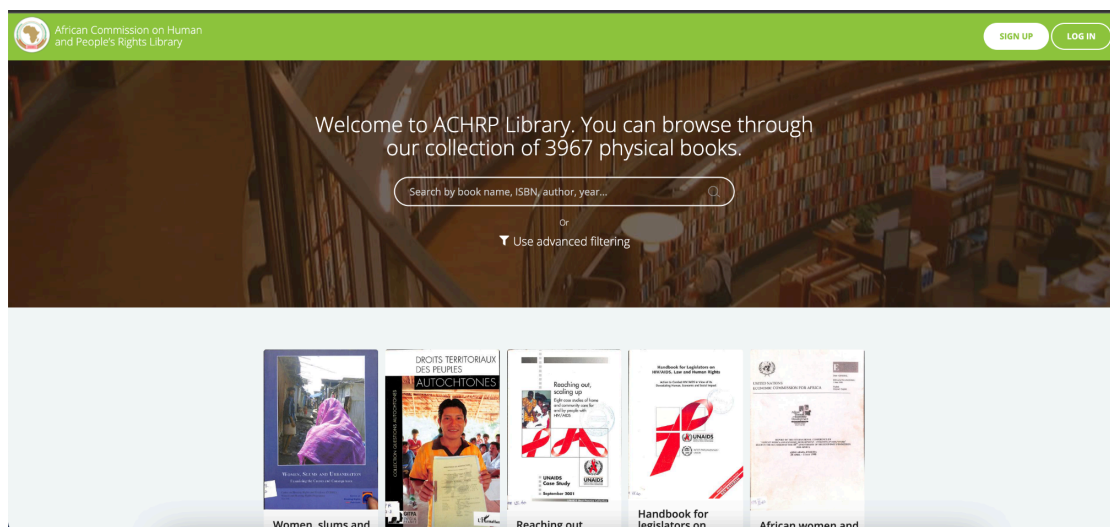
These items are ready to use, and when you click, the Home page will be replaced by the page you select.

On the right of the home page itself, you will see quicklinks to these pages:

- **Sessions Management**



- **Case Management System**
- **Library Management System**

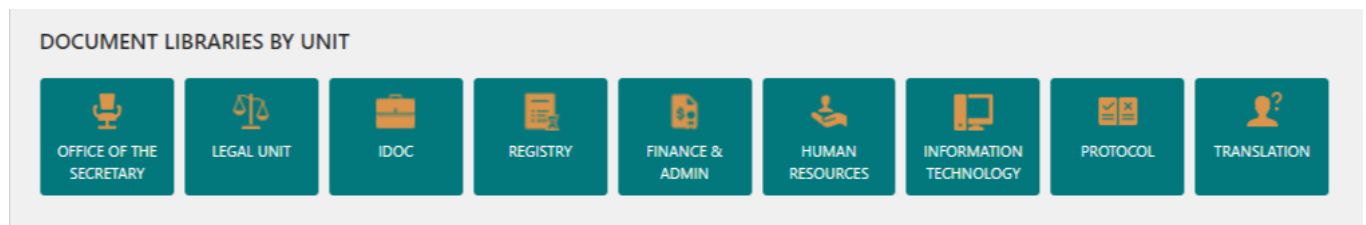


### 3.2 Document Library Tiles

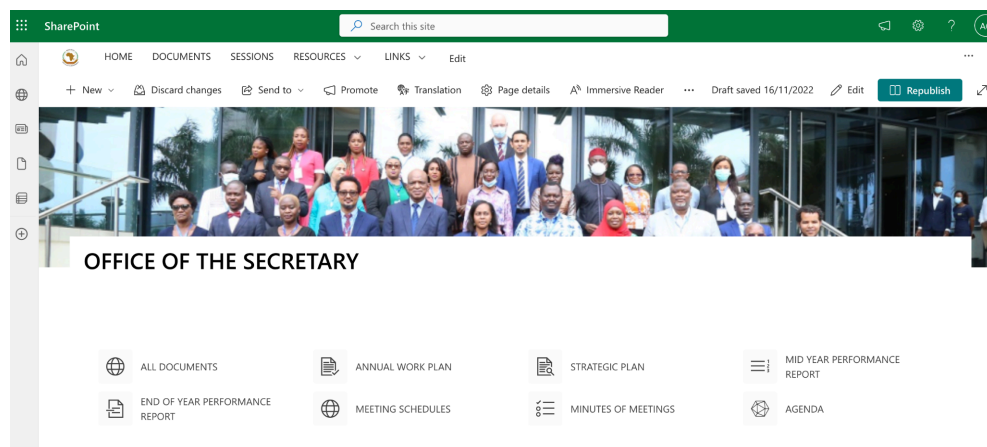
These tiles on the Homepage take members to different document libraries within the ACHPR website. Members can view document libraries for the units they have permissions for. Document libraries can be assessed by either of these 2 options

- By Unit
- By Category

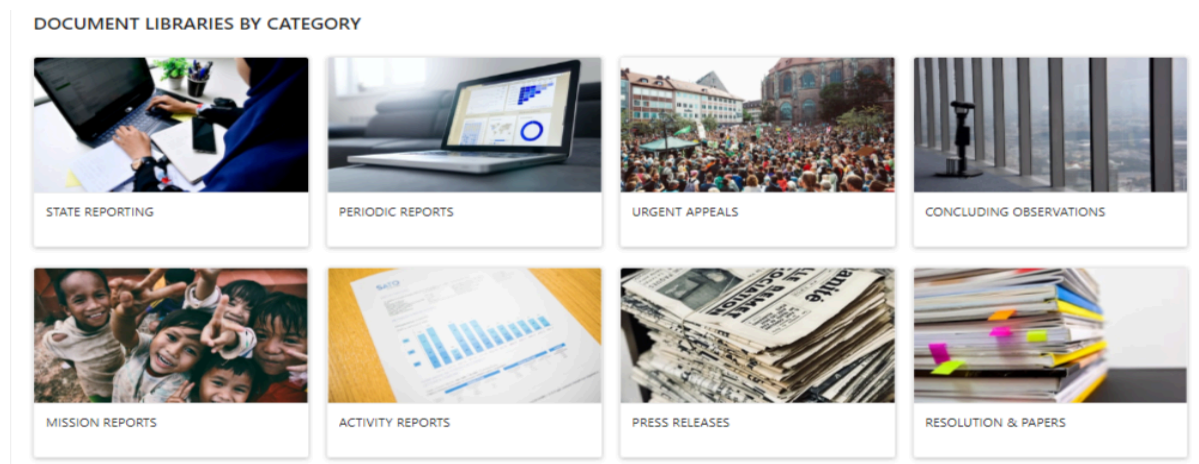
## Document Library By Unit



When members click on any unit, they are redirected to the unit's page from where they can see its document library

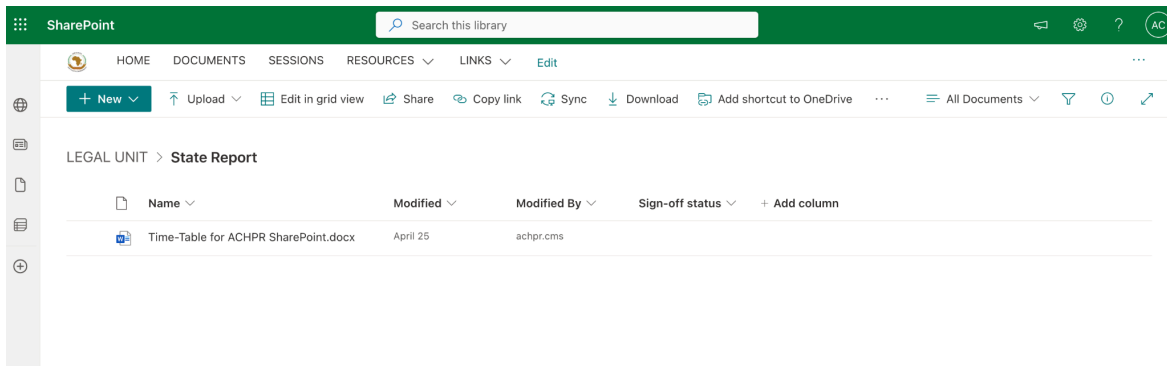


## Document Library By Category



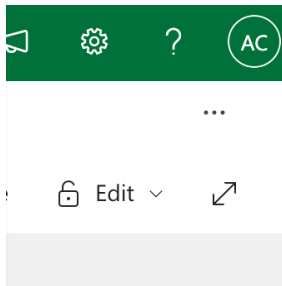
On clicking, users are directed to a particular document library under its specified unit.





### 3.3 Sharepoint Page Content

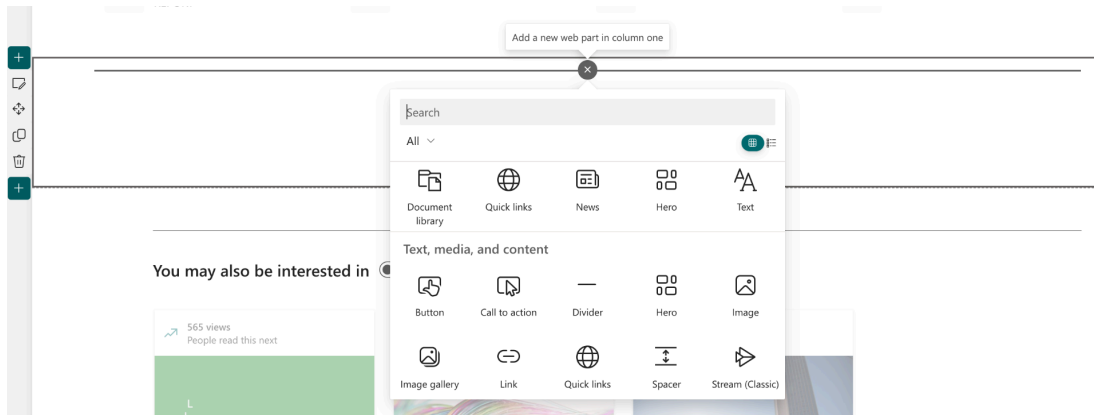
- To Edit Site Pages
- At the top right corner of the sharepoint ribbon, click on **Edit**



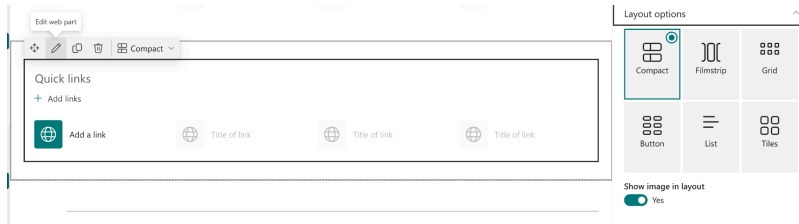
- Add a section by clicking on the  icon on the left



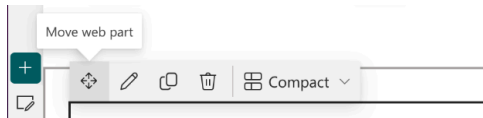
- Hover at the center top of the section to add a web part



- Select the web part you want to add and click on the  icon to edit it



- Click and drag the move icon to move web part above or beneath the current section

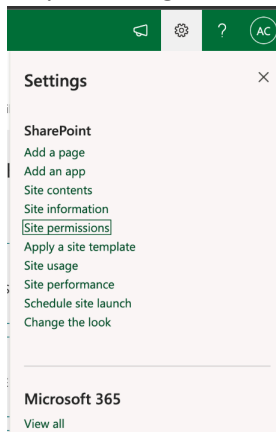


- Click on **Republish** to save changes

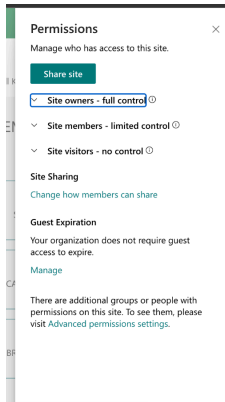


## 3.4 Sharepoint site permissions

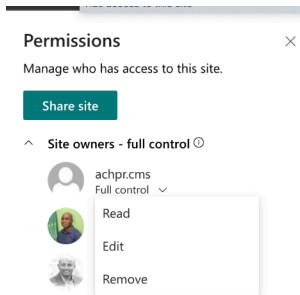
- On your site, go to the  settings icon and select **Site permissions**



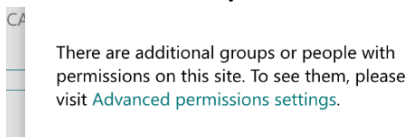
- Click on a user role to see the users under it



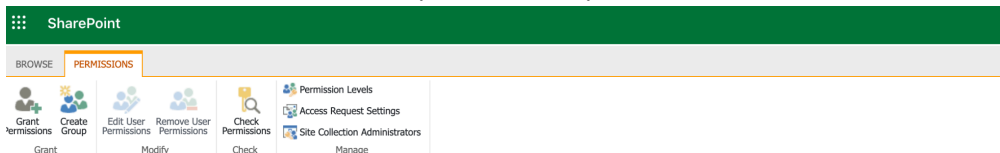
- Click on the arrow ▾ beside the user's name to edit their permissions or remove them



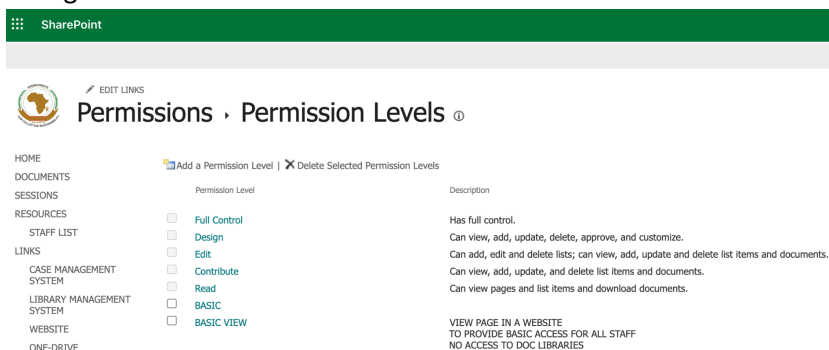
- Click on **Advanced permission settings** at the bottom to see all site permissions



- Click on **Permission levels** at the top of the Sharepoint ribbon



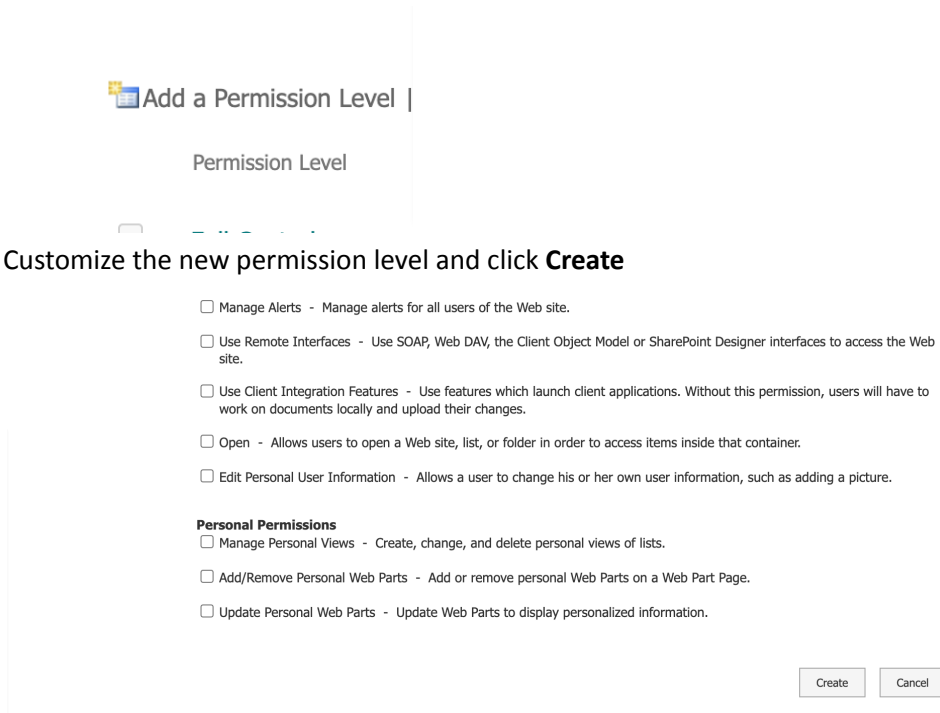
- Configure Permission Levels



## 3.5 Creating Custom Permission levels

- Go to settings and select **Site Permissions**

- Click on **Advanced permission settings** at the bottom to see all site permissions
- Click on **Permission levels** at the top of the Sharepoint ribbon
- Click **Add a Permission level**



**Add a Permission Level**

Permission Level

☐ Manage Alerts - Manage alerts for all users of the Web site.

☐ Use Remote Interfaces - Use SOAP, Web DAV, the Client Object Model or SharePoint Designer interfaces to access the Web site.

☐ Use Client Integration Features - Use features which launch client applications. Without this permission, users will have to work on documents locally and upload their changes.

☐ Open - Allows users to open a Web site, list, or folder in order to access items inside that container.

☐ Edit Personal User Information - Allows a user to change his or her own user information, such as adding a picture.

**Personal Permissions**

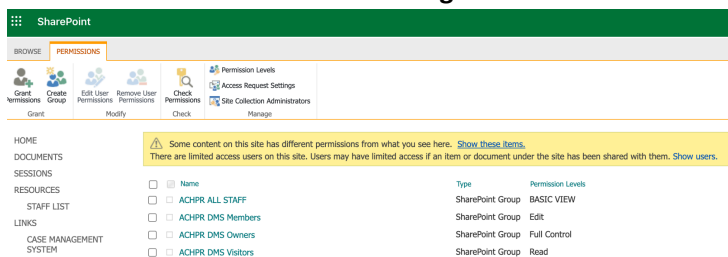
☐ Manage Personal Views - Create, change, and delete personal views of lists.

☐ Add/Remove Personal Web Parts - Add or remove personal Web Parts on a Web Part Page.

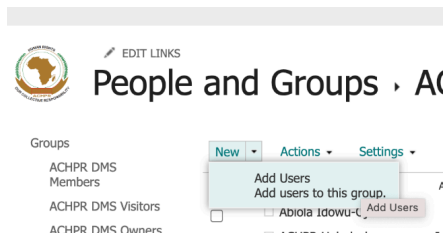
☐ Update Personal Web Parts - Update Web Parts to display personalized information.

## 3.6 Adding new user to a site

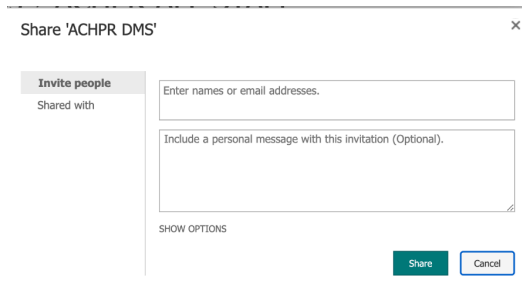
- Click on Settings on the site and go to **site permissions**
- Click on **Advanced Permission Settings**



- Click on the permission level you want to add the user to
- Click on **New** and select **Add users**



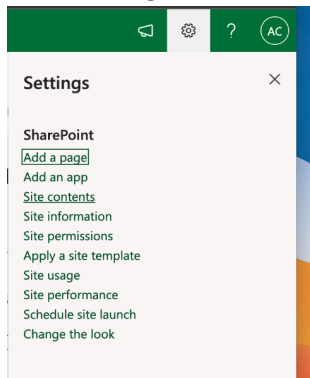
- Invite the user you want to add and click **Share**



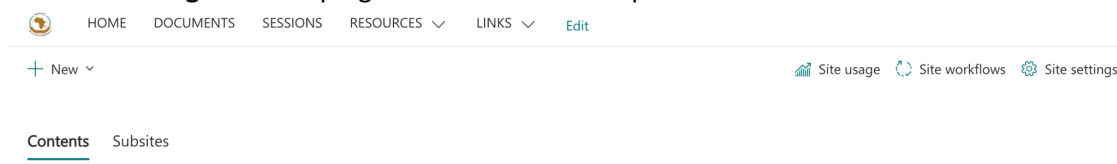
## 3.7 Site Collection features

Site collection features determine everything from the use of workflows to the online help collection that should be available to users. Most site collection features are turned off by default, but you can easily change that.

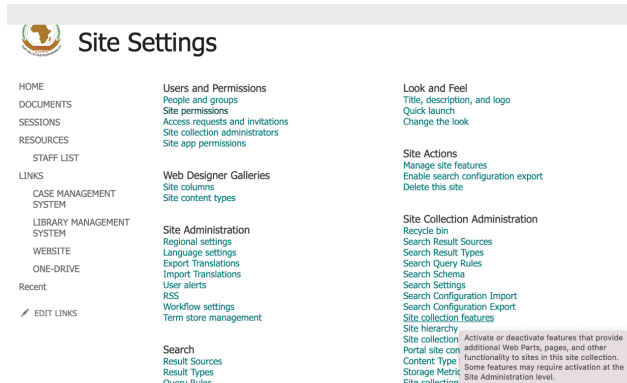
- Add features to your site
- Go to Settings and Select **Site contents** in the top menu bar



- Click **Site settings** at the top right corner of the sharepoint ribbon



- Click **Site collection features** under the Site Collection Administration heading.



- Click **Activate** to enable the site collection feature of your choice

LINKS

## Settings › Site Collection Features

| Name                                                                                                                                                                                                                                                                           | Site                                    |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------|
|  <b>Aggregated Business Calendar</b><br>Displays multiple business calendars in an overlay alongside Exchange and SharePoint calendars                                                        | <input type="button" value="Activate"/> |
|  <b>Content Type Syndication Hub</b><br>Provisions a site to be Enterprise Metadata hub site.                                                                                                 | <input type="button" value="Activate"/> |
|  <b>Cross-Site Collection Publishing</b><br>Enables site collection to designate lists and document libraries as catalog sources for Cross-Site Collection Publishing.                        | <input type="button" value="Activate"/> |
|  <b>Custom Site Collection Help</b><br>Creates a Help library that can be used to store custom help for this site collection.                                                                 | <input type="button" value="Activate"/> |
|  <b>Disposition Approval Workflow</b><br>Manages document expiration and retention by allowing participants to decide whether to retain or delete expired documents.                          | <input type="button" value="Activate"/> |
|  <b>Document ID Service</b><br>Assigns IDs to documents in the Site Collection, which can be used to retrieve items independent of their current location.                                    | <input type="button" value="Activate"/> |
|  <b>Document Sets</b><br>Provides the content types required for creating and using document sets. Create a document set when you want to manage multiple documents as a single work product. | <input type="button" value="Activate"/> |

- Click **Deactivate** to disable the site collection feature.

## 3.8 Navigating around your SharePoint Site

Use the top navigation menu or quicklinks to move through the various pages of the site.

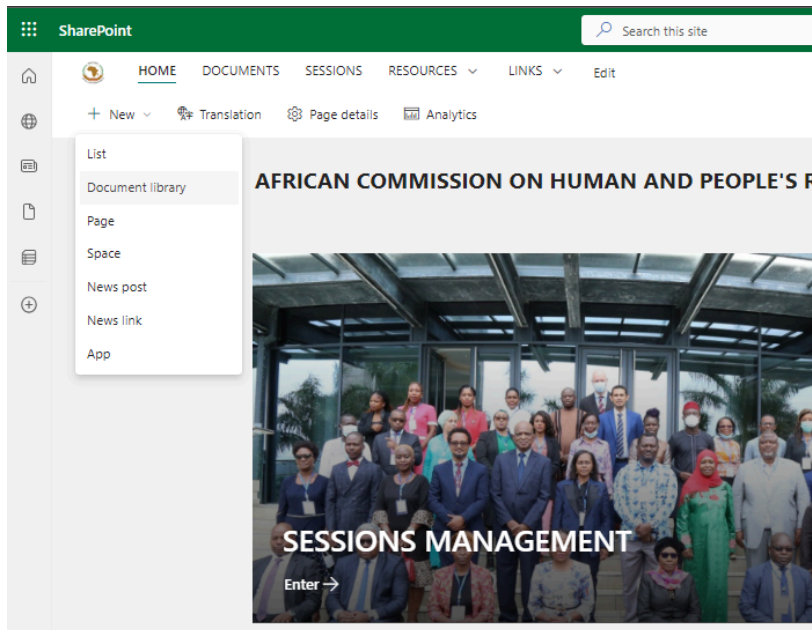
To Return to the home page

- Click the “Home” link, which is in the top left-hand corner.

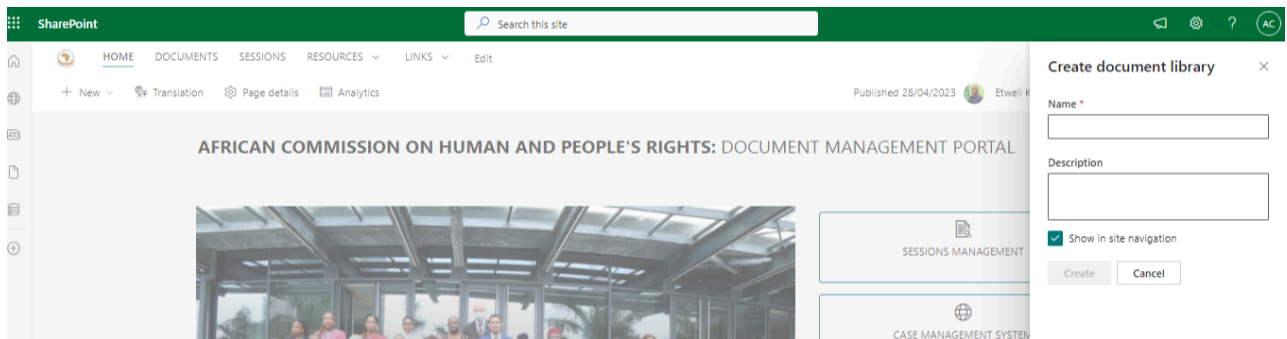
## 4 Working with Document Libraries

### 4.1 To create a library

- Click on **New** at the top left of the page
- Click **Document Library** from the drop-down menu



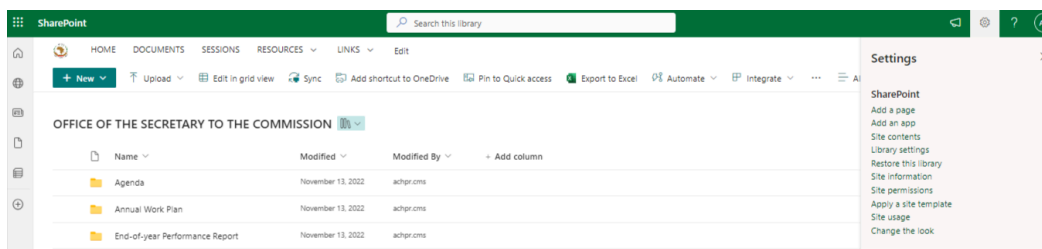
- Create a name for your document library
- Click **Create**



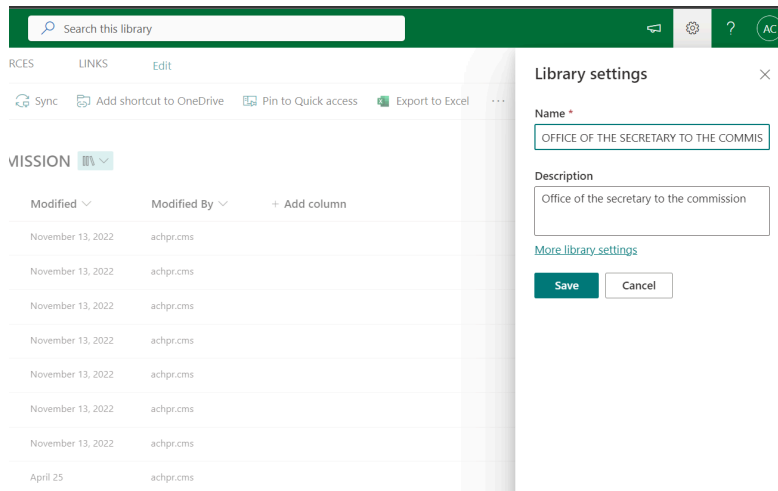
*Only Admins with permission can create document libraries*

## 4.2 To remove a SharePoint library

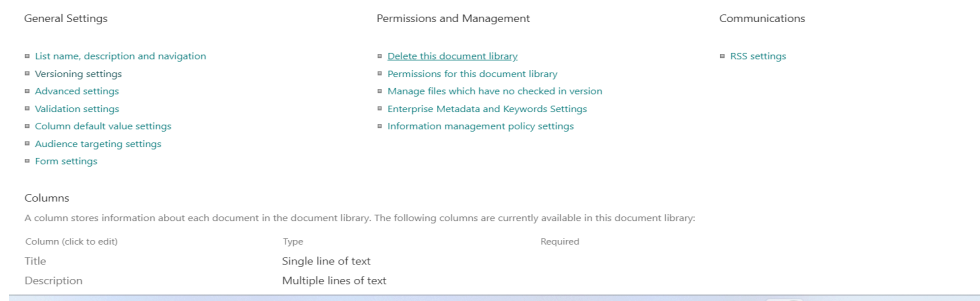
- Open the library you want to delete
- Click on the ⚙ icon at the top right of the Screen to go to Library Settings



- Click on Library Settings
- Click on **More Library Settings**



- Click on **Delete this document library**



- Click **OK** on the dialogue box that pops up to complete the action

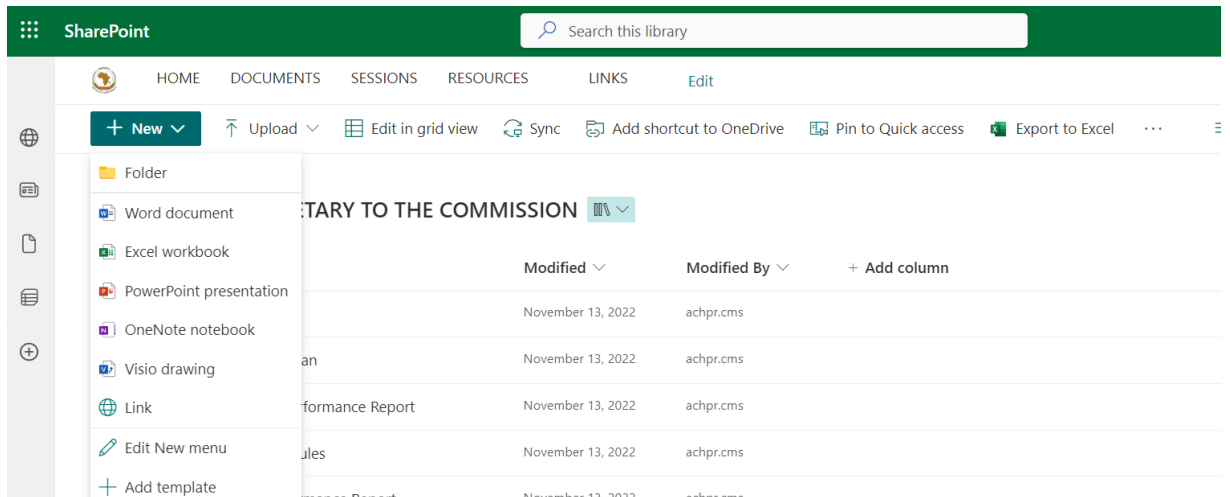
## 4.3 Create a folder

Folders can help to organize documents in a library and will help the team to find the documents they need to work on.

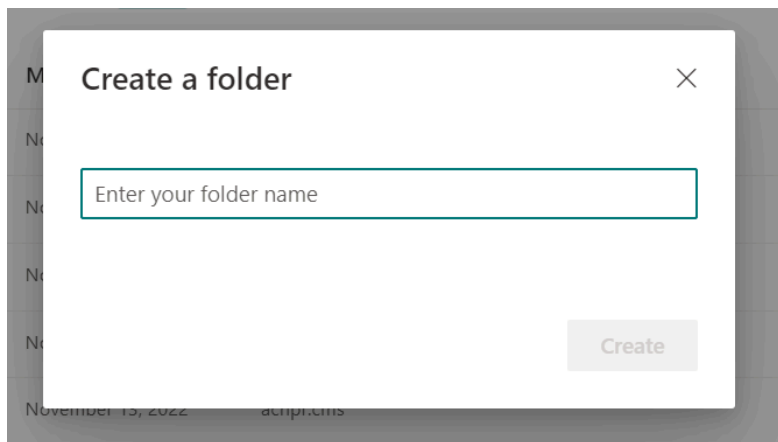
### To create a folder

- Open the library where you want to create a folder
- Click on **New**
- Click **Folder**





- Type the name of the Folder
- Click **Create**

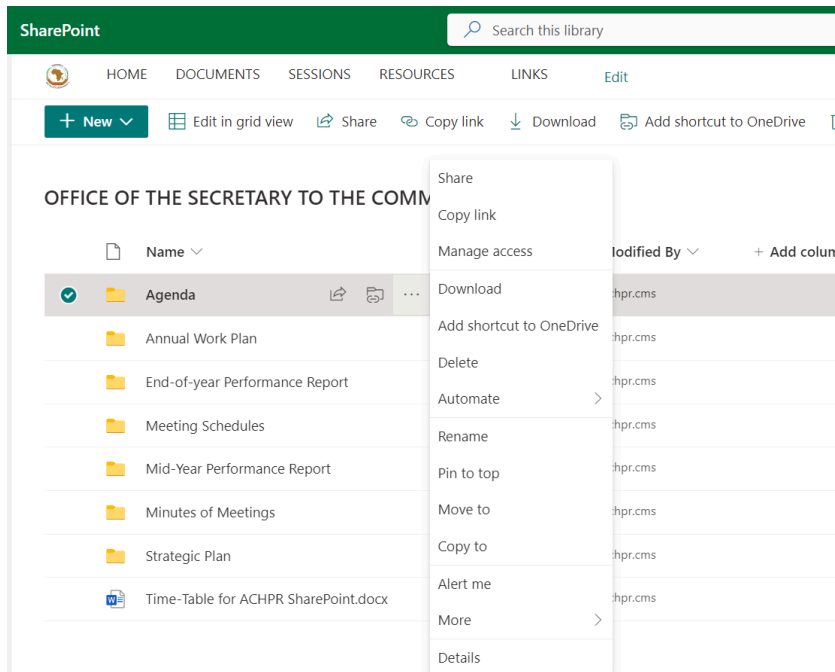


*You will now see your new folder listed in the Library.*

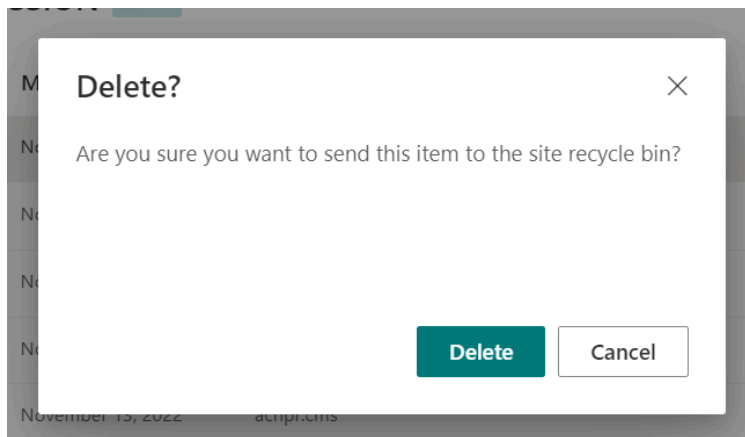
## 4.4 Delete a Folder

To delete a folder:

- Open the library containing the folder
- Click on the ellipses  icon or right click on the folder you want to delete

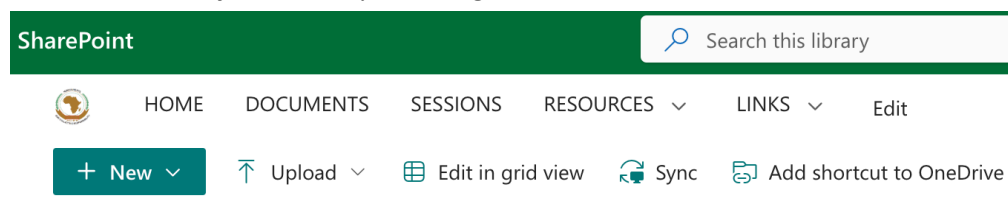


- Select **Delete** from options displayed
- Click **Delete** on the popup dialogue box to complete the action



## 4.5 To sync a library with your computer

- Open the library you want to sync
- Click on **Sync**. Ensure you are signed into OneDrive.

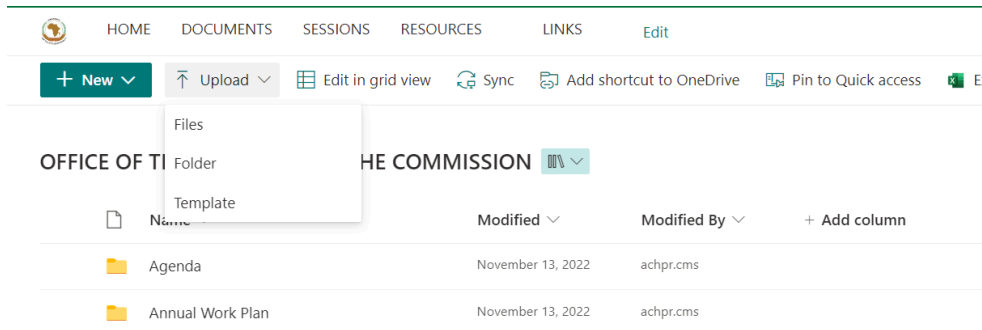


- At the Prompt, click **Sync now** to start syncing

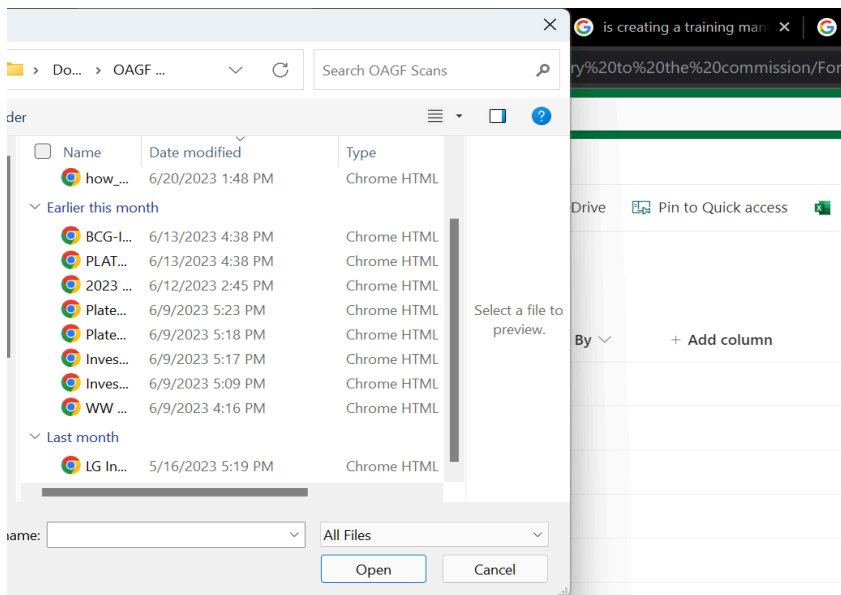
## 4.6 Upload a document into SharePoint

- To upload a document into SharePoint:

- Go to the library you want to upload the document to
- Click on **Upload** at the top right of the screen
- Select **File**



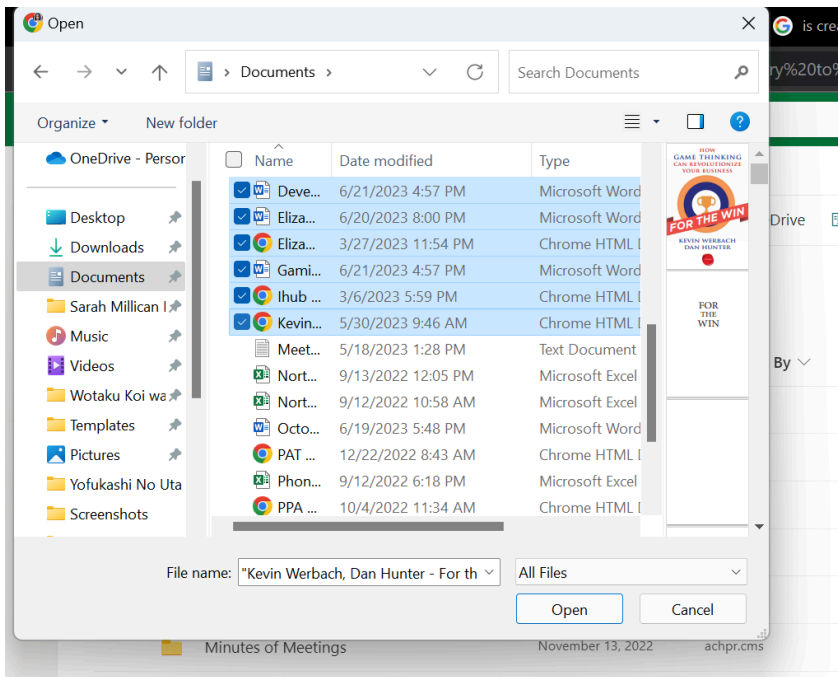
- Select the File you want to upload from your computer
- Click **Open**



*Your file or document will now be copied to SharePoint*

- To upload multiple documents to SharePoint:
- Open your folder in SharePoint and open **Windows Explorer**

- In **Windows Explorer**, navigate to the group of files you wish to upload to SharePoint and select them

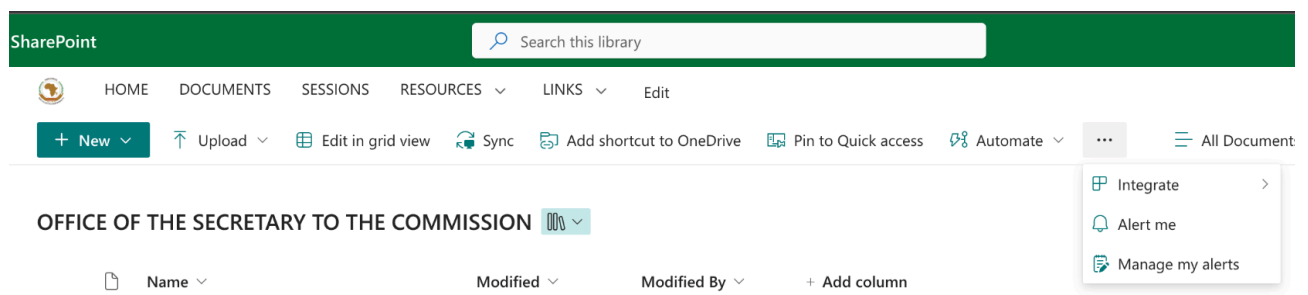


- Click **Open**

## 4.7 Create Alerts for Document Libraries

This walk-through will show you how to create an alert for a document library to notify you when the list is changed. This walk-through will only work if your SharePoint server is connected to a valid email address.

- Go to the library you want to create an alert for
- Click on the ellipses at the top navigation ribbon
- Click on Alert me



- Specify the details of your alert click **OK**

X

### Alert me when items change

**Alert Title**  
Enter the title for this alert. This is included in the subject of the notification sent for this alert.

**Send Alerts To**  
You can enter user names or e-mail addresses. Separate them with semicolons.

**Users:**

**Delivery Method**  
Specify how you want the alerts delivered.

**Send me alerts by:**

☒ E-mail

☐ Text Message (SMS)

☐ Send URL in text message (SMS)

**Change Type**  
Specify the type of changes that you want to be alerted to.

**Only send me alerts when:**

☒ All changes

☐ New items are added

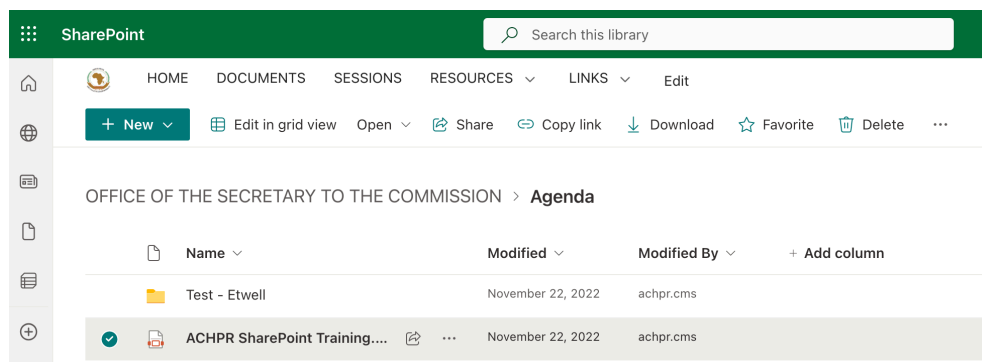
☐ Existing items are modified

☐ Items are deleted

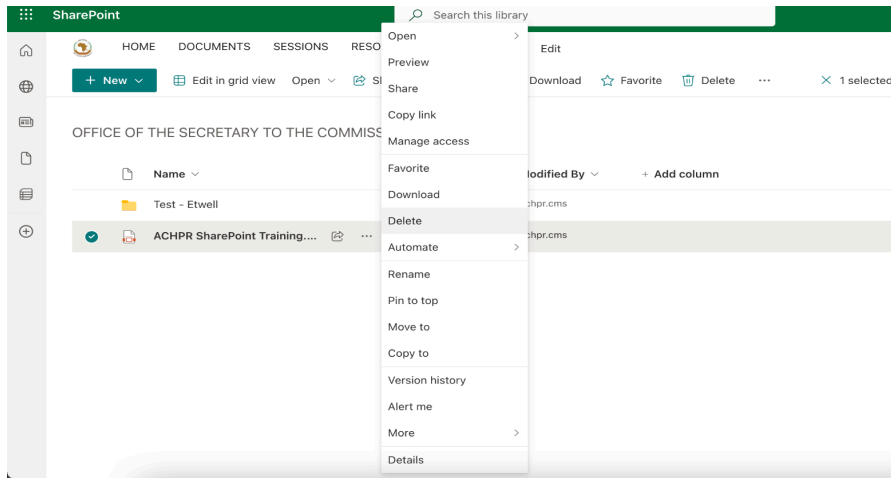
## 4.8 Remove a document in SharePoint

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:
  - Open the document library or folder
  - Select the document you want to delete
  - Click on **Delete** at the top right



- Or click on the ellipses  beside the chosen document or right click on the document
- Click **Delete**



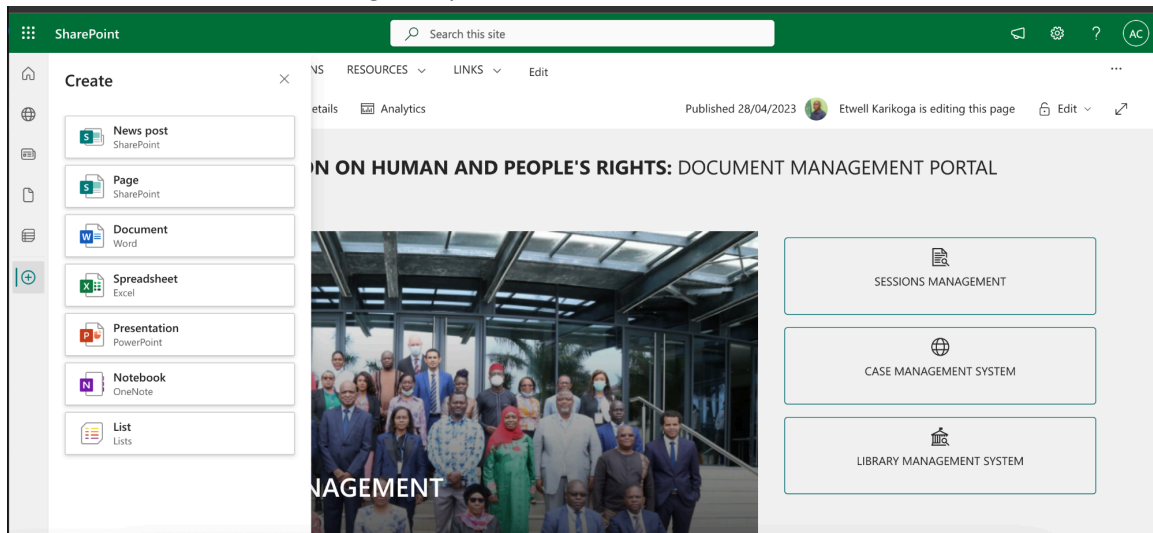
- Click **OK** to confirm deletion

## 5 Working with Lists

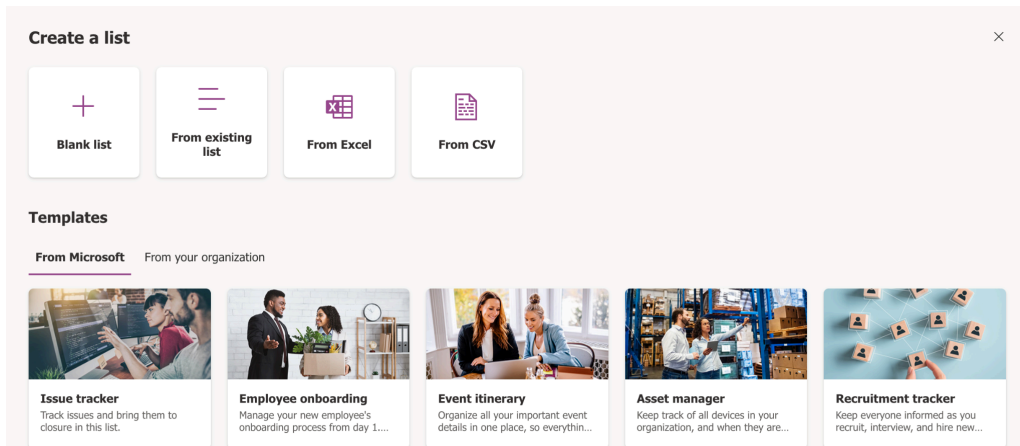
SharePoint lists are collections of information or items. Items can be referred to as metadata, fields, or properties, while the rows in the list are referred to as the list.

### 5.1 Creating a new list

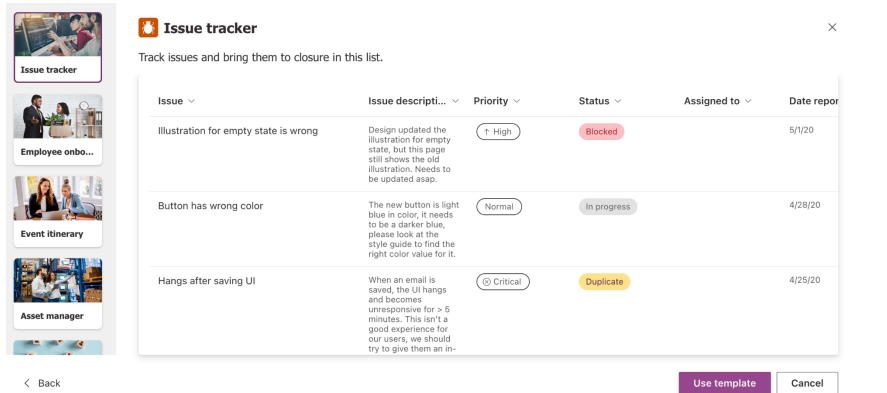
- Click on ⊕ icon on the left navigation panel and choose list.



- To create a list from scratch, Click on **Blank List** or import data from an existing list, Excel or CSV



- To create a list using a template, Click on one of the templates available **from Microsoft** or **From your organization**
- Preview the template and click **Use Template**.



- Customize your List and click **Create**.

×

Name \*

Issue tracker

Description

What is your list about?

Choose a color

✓

Choose an icon

⚙️

📅

🎯

📋

✈️

🚀

🧠

💡

📦

🧪

🤖

🧑

📺

🏠

👤

☕

🛒

✉️

Save to \*

🏠 My lists

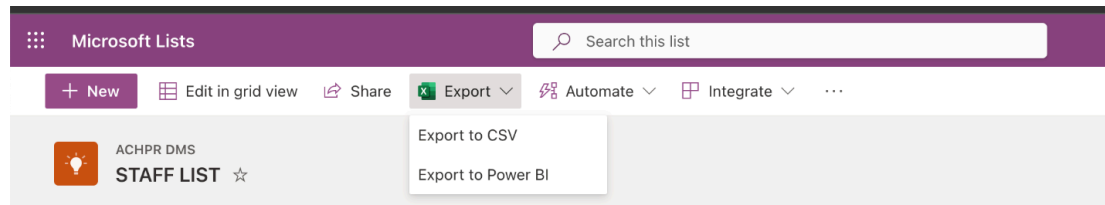
← Back

Create

Cancel

## 5.2 Exporting List Data

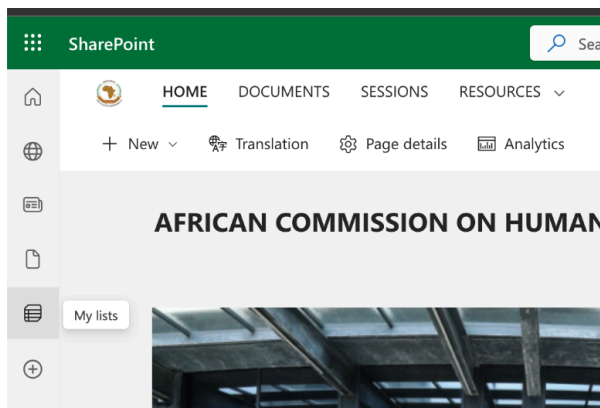
- Click on Export at the top ribbon of the List
- Click on the format you want to export the data to



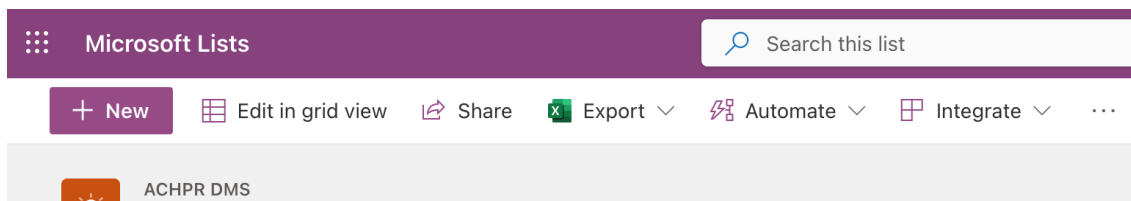
*Your list will be downloaded to your computer*

## 5.3 Import Excel Spreadsheets to Lists

- Click on The List icon on the right panel and go to the list you want to import the sheet from



- Click on **New** at the top left of the screen



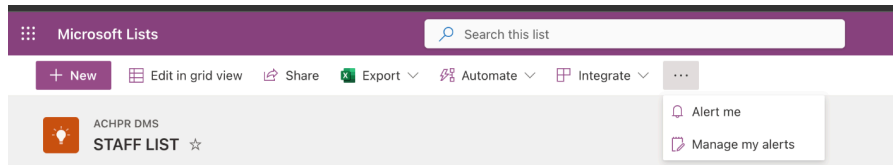
- Fill the details of the document and click on **Attach file** to select a document from your computer



- Select the spreadsheet you want to import. It should be a .xslx file
- Click Open to Complete the action

## 5.4 Add alerts for lists

- Go to the list
- Select the ... (ellipses), and then select **Alert Me**.

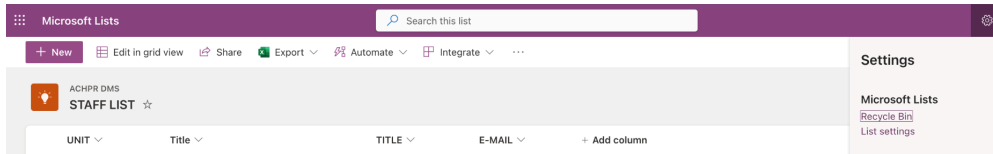


- In the **Alert me when items change** dialog, select and change the options you want.

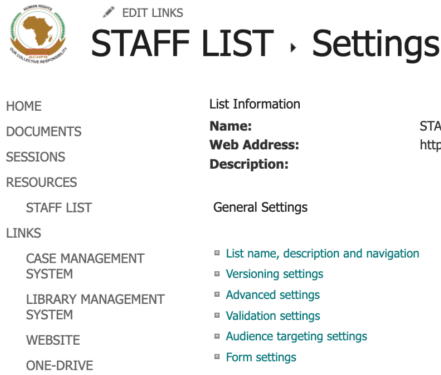
- To save, select **OK**.

## 5.5 Configure Content Approvals/ Version History

- Go to the list
- Select Settings on the sharepoint ribbon and then **List settings**.



- In the General settings section, select **Versioning settings**.



- In the Content Approval section, select **Yes** in answer to the Require content approval for submitted items?
- In the Item Version History section, specify whether you want to create versions each time an item is edited. You can also choose to limit the number of versions that are retained.
- In the Draft Item Security section, determine which users can see draft items in the list.
- You can choose the option you want

**Content Approval**  
Specify whether new items or changes to existing items should remain in a draft state until they have been approved. [Learn about requiring approval.](#)

Require content approval for submitted items?  
☐ Yes ☒ No

**Item Version History**  
Specify whether a version is created each time you edit an item in this list. [Learn about versions.](#)

Create a version each time you edit an item in this list?  
☒ Yes ☐ No

Keep the following number of versions:  
50

☐ Keep drafts for the following number of approved versions:  
50

**Draft Item Security**  
Drafts are minor versions or items which have not been approved. Specify which users should be able to view drafts in this list. [Learn about specifying who can view and edit drafts.](#)

Who should see draft items in this list?  
☒ Any user who can read items  
☐ Only users who can edit items  
☐ Only users who can approve items (and the author of the item)

OK Cancel

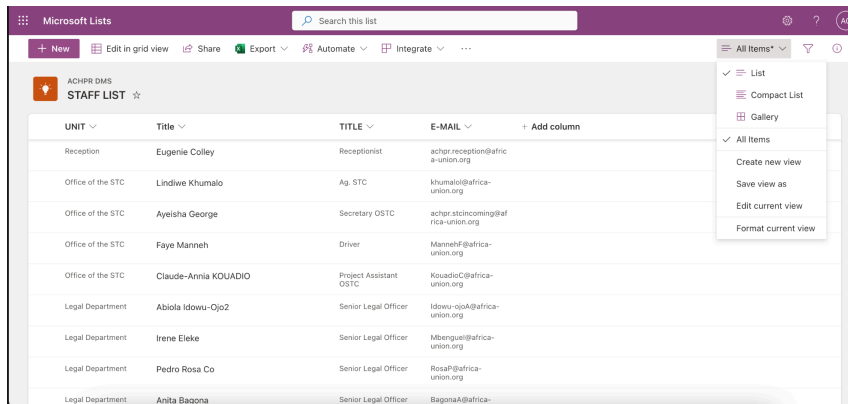
- Select OK.

## 6 Working with Views

You can create custom views of lists to organize and show items that are most important to you.

### 6.1 Select a View

- Go to the list and click **More Options** at the top right side of the navigation panel
- Click on the type of view you want



## 6.2 Create a View

- Go to All items in the library and click **Create new view**
- To create a personal view, uncheck the box for public view. Public views (Shared views) can be visited by anyone with access to the list
- Customize view details and click **Create**

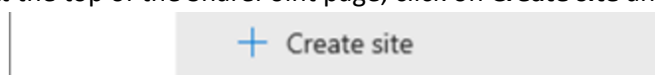
## 6.3 Change Default View

- Go to All Items in the library and click **Edit current view** for the view you want to make the default
- On the Edit View page, select the **Make this the default** view check box and then **OK**.

# 7 Working With Sites

## 7.1 Creating Team Sites

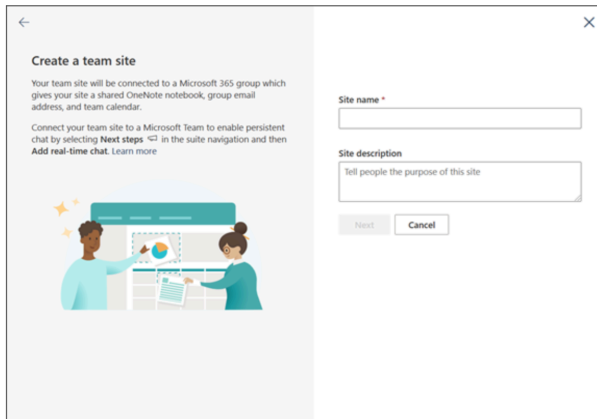
- In the top left corner of the page, select the SharePoint tile 
- At the top of the SharePoint page, click on **Create site** and choose the **Team site** option



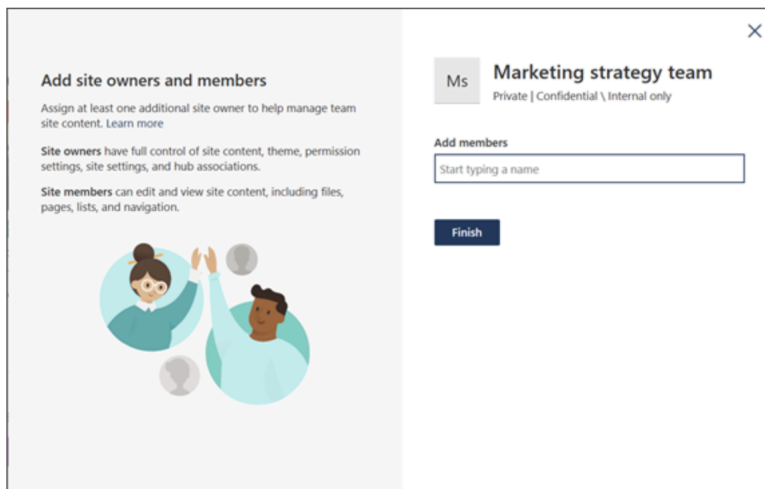
- Select a team site template, or create a team site from scratch by selecting the **Team**

collaboration template..

- Edit your new site details and click **Next**

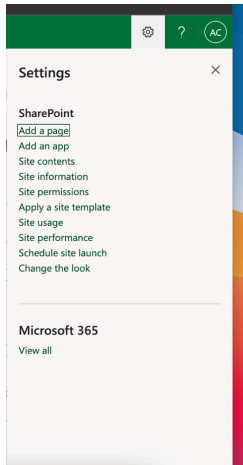


- **choose either** Public - anyone in the organization can access this site or **Private** - only members can access this site to control who has access to your site.
- Add members you want to access the site and click **Finish**

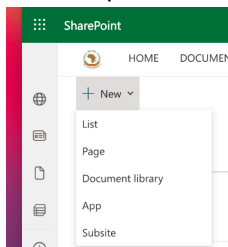


## 7.2 Creating Subsites: Blog

- Go to the SharePoint Online site that you want to use to create your blog.
- Click on the ⚙ settings icon and select **Site Contents**



- At the top left Click on **New** and select **Subsite**.



- Enter the name you want for your blog and add a description.
- Enter the end of the URL that you want to use for the blog in the **Web Site Address**.
- Go to the **Collaboration** tab and select **Blog**.
- Set user permissions. You can either use inherited permissions from the parent site or unique permissions. Unique permissions are set up after building the blog.
- Under Navigation Inheritance, select **Yes** or **No** to use the top navigation bar from the parent site.
- Click **Create** to finalize your blog.

Navigation

☐ Display this site on the Quick Launch of the parent site?

☐ Yes ☒ No

☐ Display this site on the top link bar of the parent site?

☒ Yes ☐ No

Navigation Inheritance

☐ Use the top link bar from the parent site?

☐ Yes ☒ No

Create Cancel

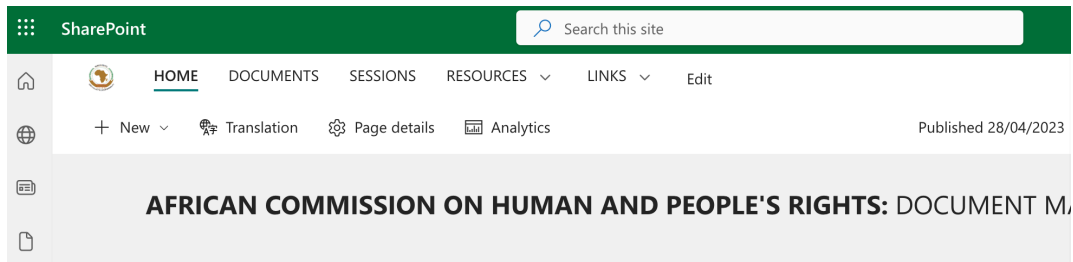
- Create your first blog post by clicking Create post.

## 8 Searching for a document or file in SharePoint

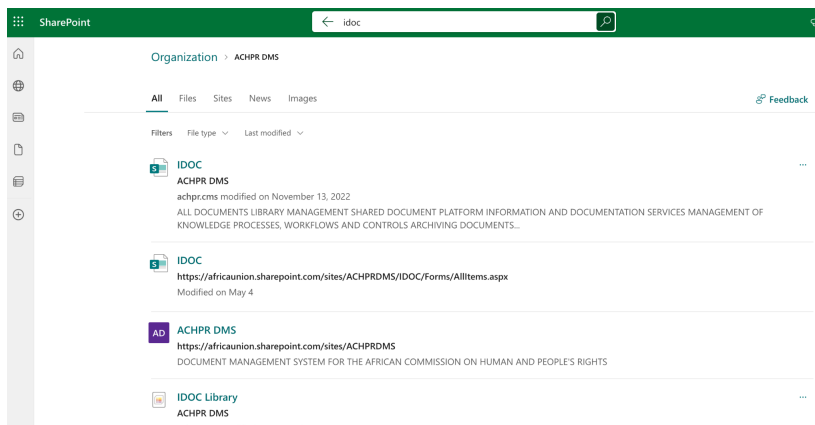
You can search for any document or item in your site easily by its name or part of its name.

## 8.1 To search the entire site:

- Click on the search box, which is located at the top right of the page
- Type in your search text to look for any content on the site containing this text
- Press **Enter**

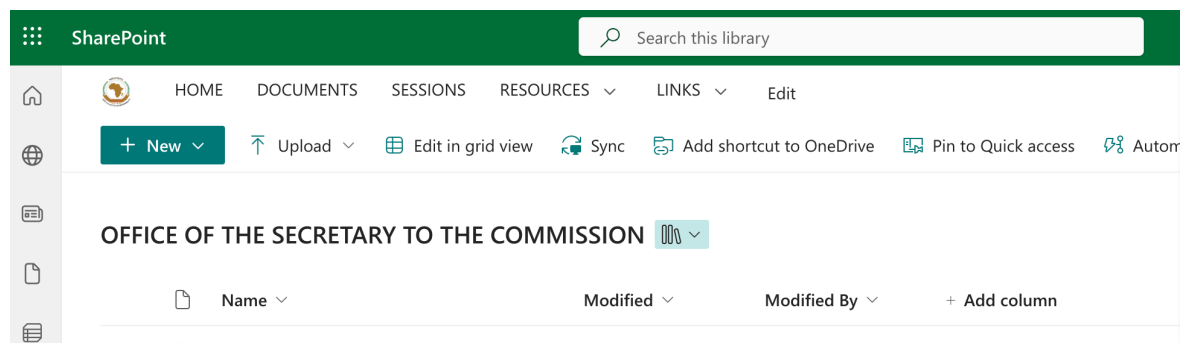


## Search Result Example



## 8.2 To search the contents of a library or folder:

- Go to the library you want to search
- Click on the search box, which is located above the document list
- Type in your search text in the search box located above the document list
- Press **Enter**



- The listed content of the library or folder will condense to show only the results.

### 8.3 To Search By Property

| Search Property                                   | Syntax (property: value)                                                                                                                                                           |
|---------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Filename                                          | Type <b>filename:"Budget"</b> to find a file named "Budget.xlsx"                                                                                                                   |
| File type                                         | Append <b>filetype:xlsx</b> to your query to display only search results that are Excel workbooks.                                                                                 |
| Wildcards                                         | Use an asterisk "*" for a prefix match with a keyword or property to find documents                                                                                                |
| Search on different properties                    | Space between searched terms are interpreted as an AND so <b>title:budget filetype:xlsx</b> search will return only Excel workbooks with titles that begin with the word "Budget." |
| Exclude certain search results                    | To exclude search results that contain certain terms, use a minus sign (-) before the term that you want to exclude.                                                               |
| Search for alternate values for the same property | Spaces between terms that use the same property are interpreted so <b>author:"John Smith" author:"David Jones"</b> will return items that were created by either person.           |
| Date/time                                         | Any date/time property in any format can be used with relational or logical operators to form a query so <b>specs modified=7/8/09</b> will return items modified on July 8, 2009.  |

### 8.4 To see the full content of the library or folder

again:

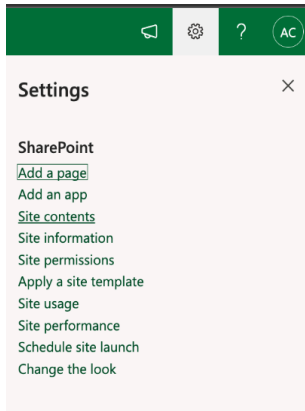
Click on X next to the search text

## 9 Monitoring Site Activity

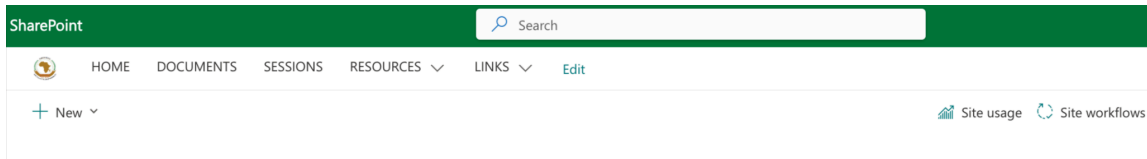
As a Microsoft 365 admin, the Reports dashboard shows you the activity overview across various products in your organization. It enables you to drill in to get more granular insight about specific site activity.

### 9.1 View Site usage

- Go to Settings and click on **Site Contents**



- On the top right of the Sharepoint ribbon, click on **Site Usage**

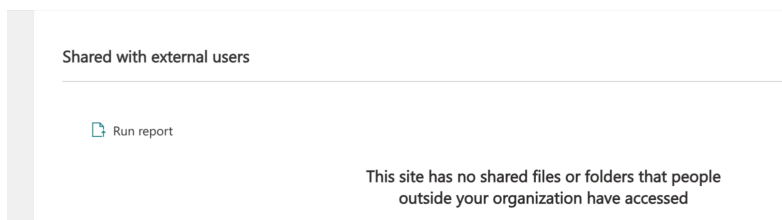


- View Site Usage Analytics



## 9.2 Create Activity Reports

- Click on **Site Contents**
- Click on **Site Usage**
- Scroll to the bottom of the Site Usage Analytics Page
- Click on **Run Report**



- Select the destination to save the report and Click **Save**



---

+ New ▾

ACHPR DMS > DOCUMENTS

Choose a destination to save this report

|  Name | Modified | Modified by |
|----------------------------------------------------------------------------------------|----------|-------------|
|----------------------------------------------------------------------------------------|----------|-------------|

---



|      |        |
|------|--------|
| Save | Cancel |
|------|--------|

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