

PROMISE TA Center SharePoint Portal User Manual

<https://aucd.sharepoint.com/sites/promisetacenter>

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The PROMISE TA Center SharePoint Portal is a web-based system for accessing, editing, managing, and sharing collections of documents as well as holding discussions with grantees staff. This password-protected shared web space creates a place for the PROMISE Model Demonstration Project Teams to access draft materials, events, and share information and ideas. The PROMISE TA Center Grantee Portal uses Microsoft Office 365 SharePoint to provide a password-protected, secure, manageable, web-based collaborative environment. SharePoint is designed to function most fully with Microsoft Office tools including Word, Excel, and PowerPoint. To access the portal, you must be connected to the internet.

This manual includes the following topics:

- Re-registering to obtain a new Microsoft Office account
- Accessing the PROMISE TA Center SharePoint Grantee Portal
- Accessing and using the Portal’s features
- Alerts

Help Contact

If you need assistance or have questions about the PROMISE TA Center SharePoint Portal, please contact any of the following:

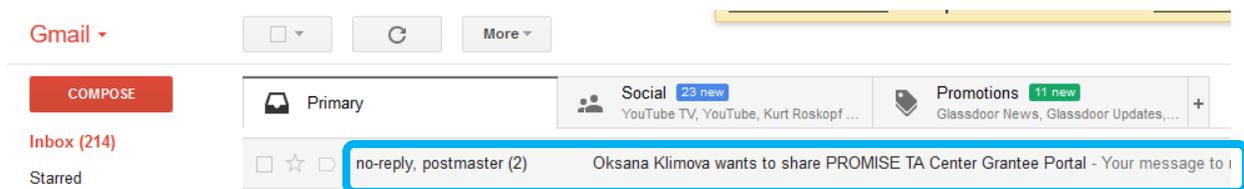
- Ingrid Jernudd, Program Specialist
ijernudd@aucd.org
- Oksana Klimova, Director of Web Services
oklimova@aucd.org

Because of the transition from Grantee Portal that is currently built in SharePoint 2010 to SharePoint 365, you will be asked once to go through the account re-registering process.

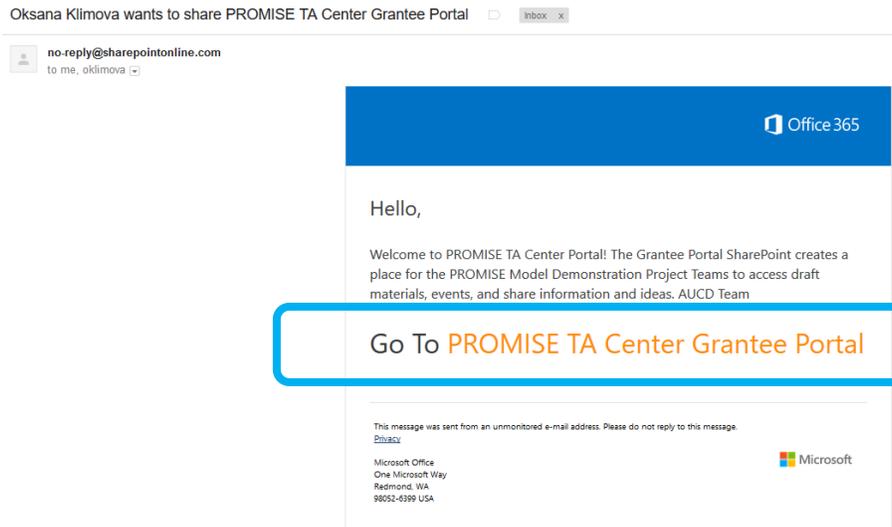
How to re-register for the new PROMISE TA Center Grantee Portal

An invitation email will be sent to you to the email address you provided to AUCD Help Contact team to join the previous version of SharePoint portal (SharePoint 2010).

The subject line of the email will be ‘#name_of_person_who_will_invite_you#’ wants to share PROMISE TA Center Grantee Portal’. The screenshot below is an example of a DEMO invitation to a demo Gmail address:

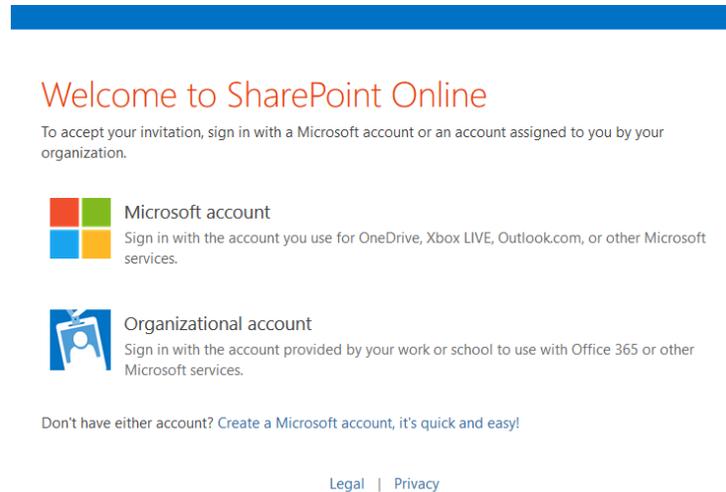


The email invitation will contain a link to the PROMISE TA Center Grantee Portal:



The link will take you to the page where you will log in with your existing account or will go through the process of creating your new Microsoft account.

On the page below you will see two options: 1) Microsoft account; and 2) Organization account.



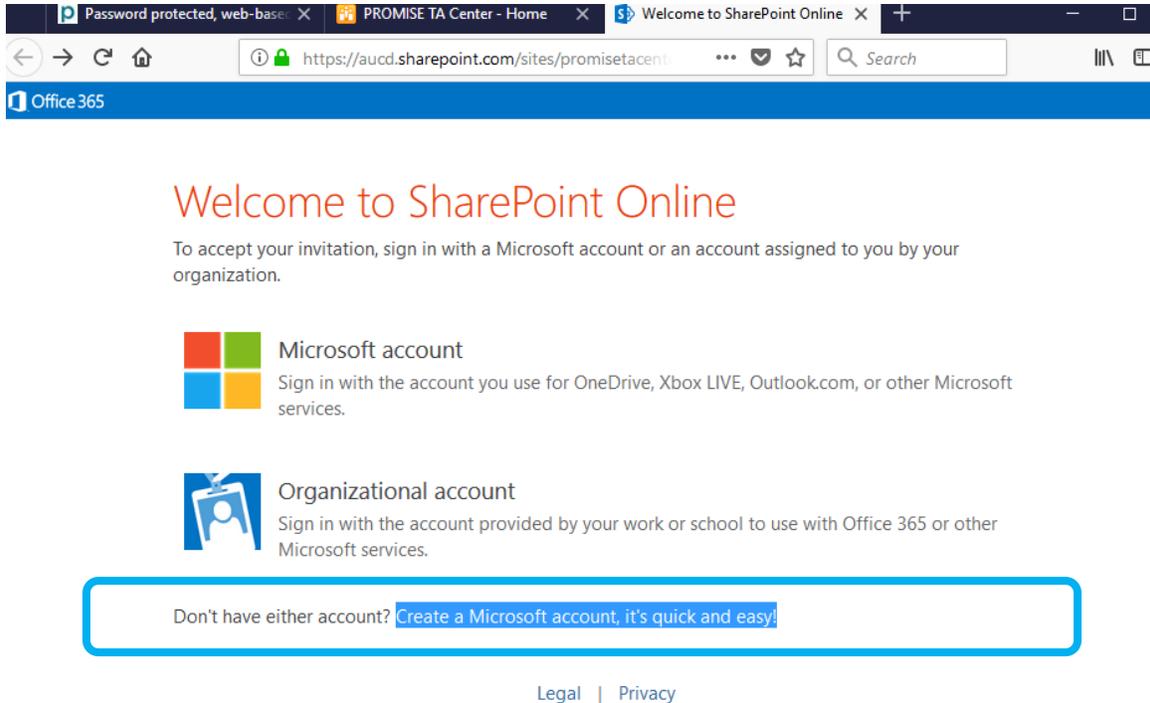
Which option to choose?

Step 1: Do you have an account for Office 365? You do if you can check your email by logging in to the web browser at the address:

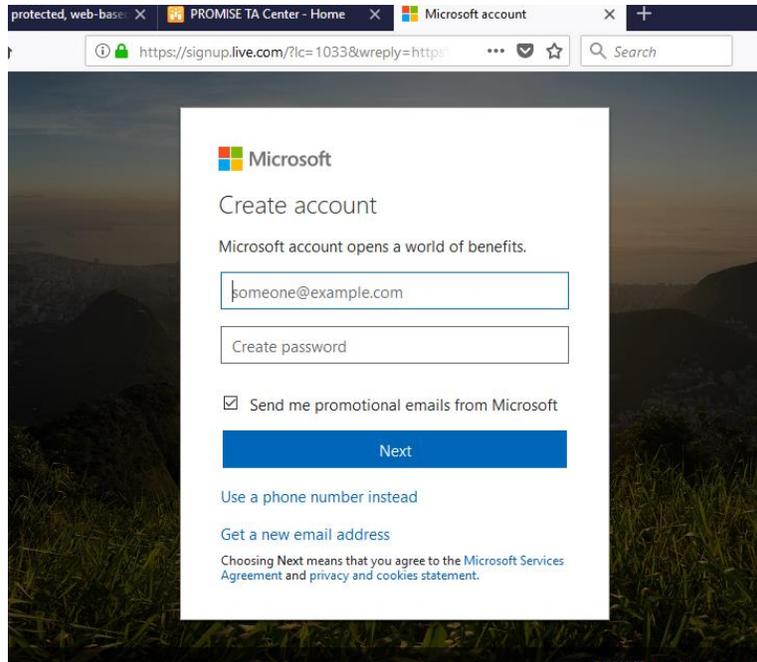
<https://outlook.office.com>

If you can successfully log into outlook.office.com, select option **Organizational account** and proceed to the login page. To log in use the same account (username/email and password) that you used to access your emails at outlook.office.com.

Step 2 (If you do not have an Organizational account): Do you have a Microsoft account? If you do not know the answer to that question, then click the link [‘Create a Microsoft account, it’s quick and easy!’](#) at the bottom of the window.

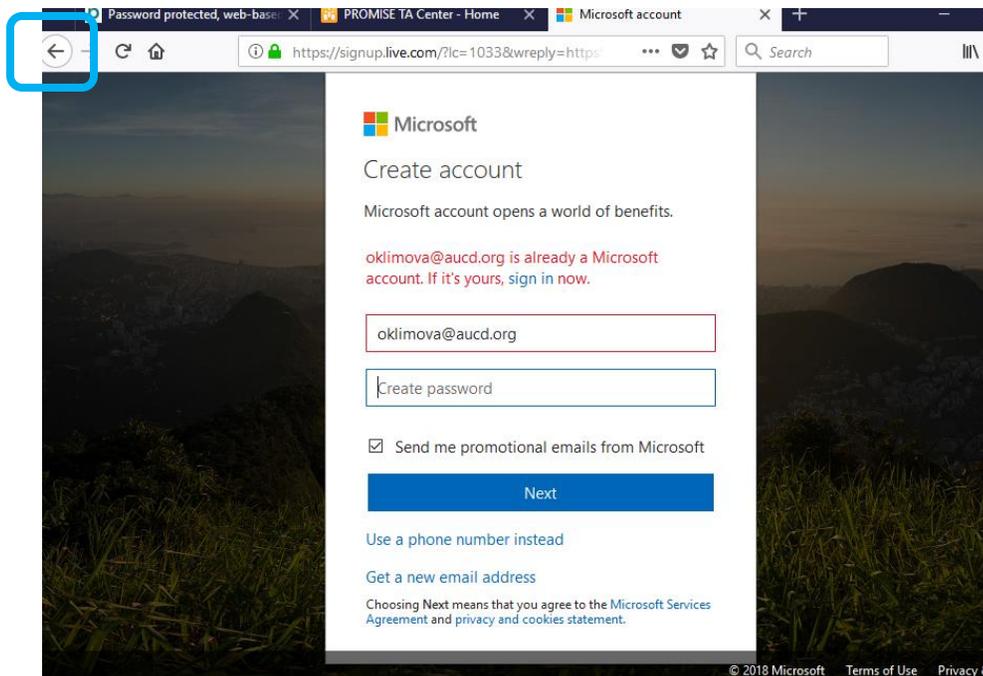


You will end up on the **Create Account** page.

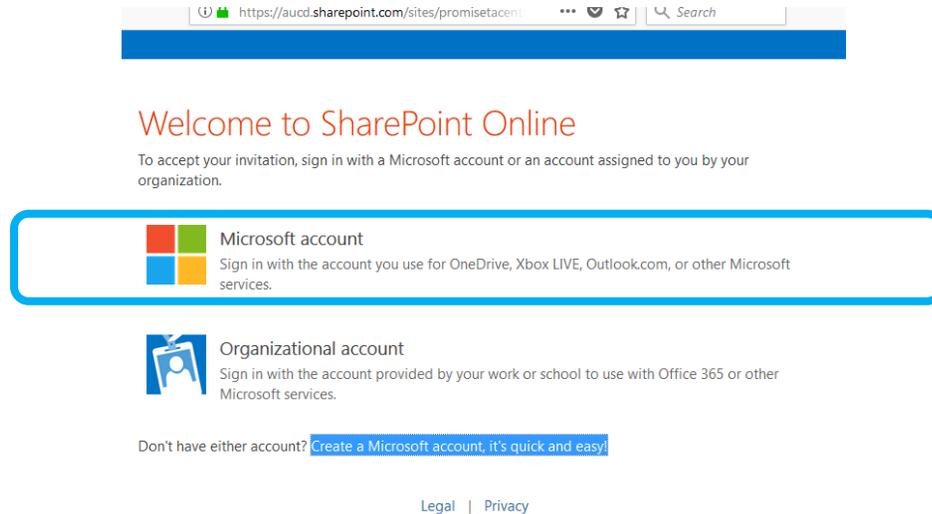


Type in your email address. Two scenarios can happen:

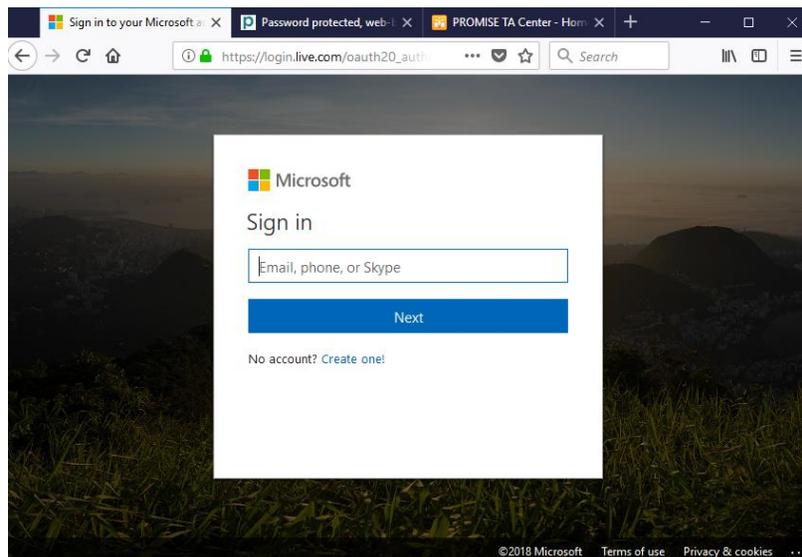
- a) You do NOT have a Microsoft account and you will go through the process of creating an account and will be logged into the Grantee portal.
- b) You do have a Microsoft account, but you did not know/forgot about it. In this case, the page will give you a warning when you will try to type a value in the **password** field:



In this case, click browser button 'Back' and select the 'Microsoft account' option.



The option 'Microsoft account' will take you to the **Microsoft Account Sign-in** page:



Type your email in and click the button 'NEXT'. You will be sent to the **Enter password** page. There you will select the 'Forgot my password' link at the bottom of the form.

At the end of the process of updating your password you will be logged into the Grantee Portal.

Accessing the PROMISE TA Center Grantee Portal

After obtaining a username (email address) and password, you will be using those to log into the portal.

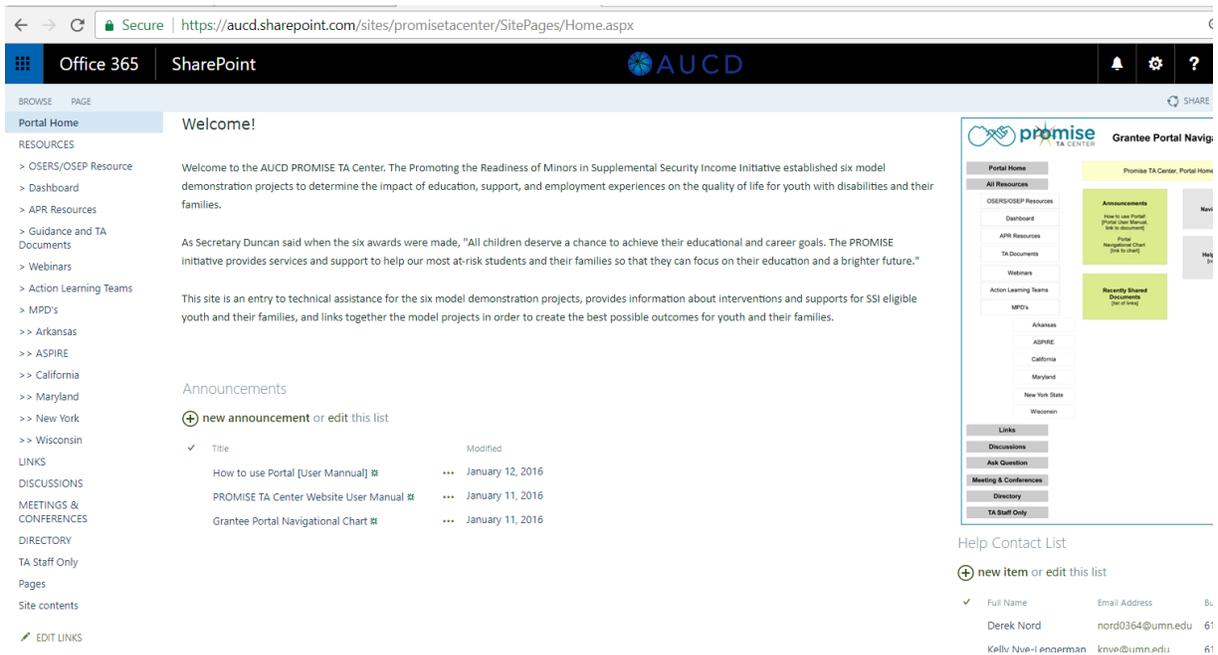
You will be enrolled in security group Members. This group grants you contribute permissions (add, read, edit, delete files) in the SharePoint Portal.

Currently the Portal contains two areas: (1) an area with general information accessible to all fellows and visitors of the portal and (2) an area **TA Staff ONLY** that has restricted access.

PROMISE TA Center SharePoint Grantee Portal

Homepage

After you log in, you should be sent to the homepage of the PROMISE TA Center SharePoint Portal.



Document Libraries

The following document libraries can be found in the PROMISE TA Center SharePoint Portal:

Portal Home

1. OSERS/OSEP Resources
2. Dashboard
3. APR Resources
4. Guidance and TA Documents
5. Webinars
6. Action Learning Teams
7. MPD's

- a. Arkansas
- b. ASPIRE
- c. California
- d. Maryland
- e. New York
- f. Wisconsin

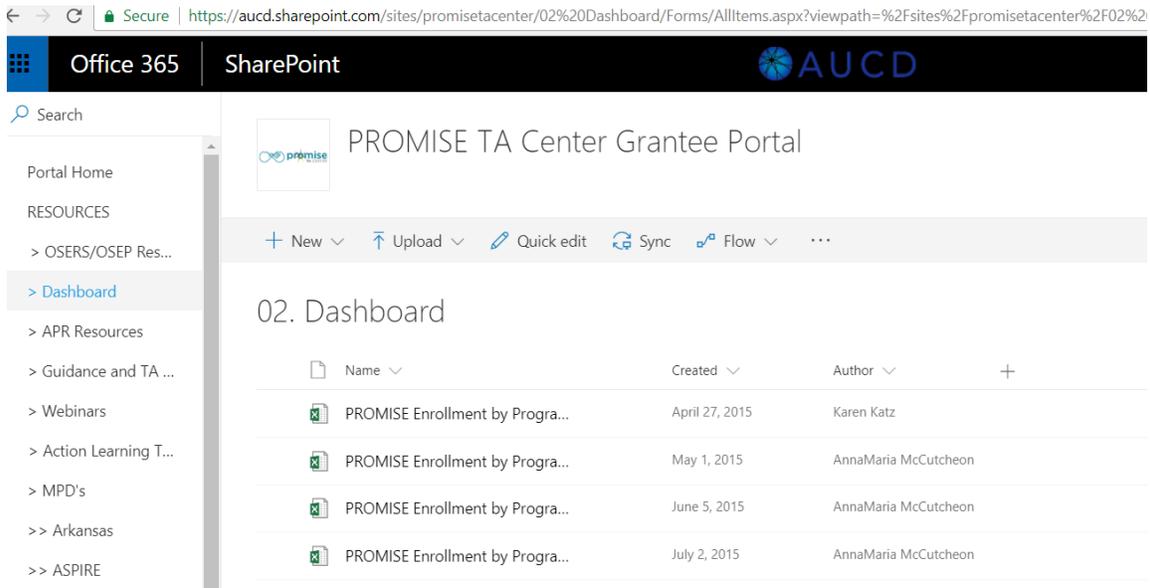
TA Staff Only

- 1. Shared Documents

Manage File/Document in Document Library

Files or documents can be posted into the document libraries listed above.

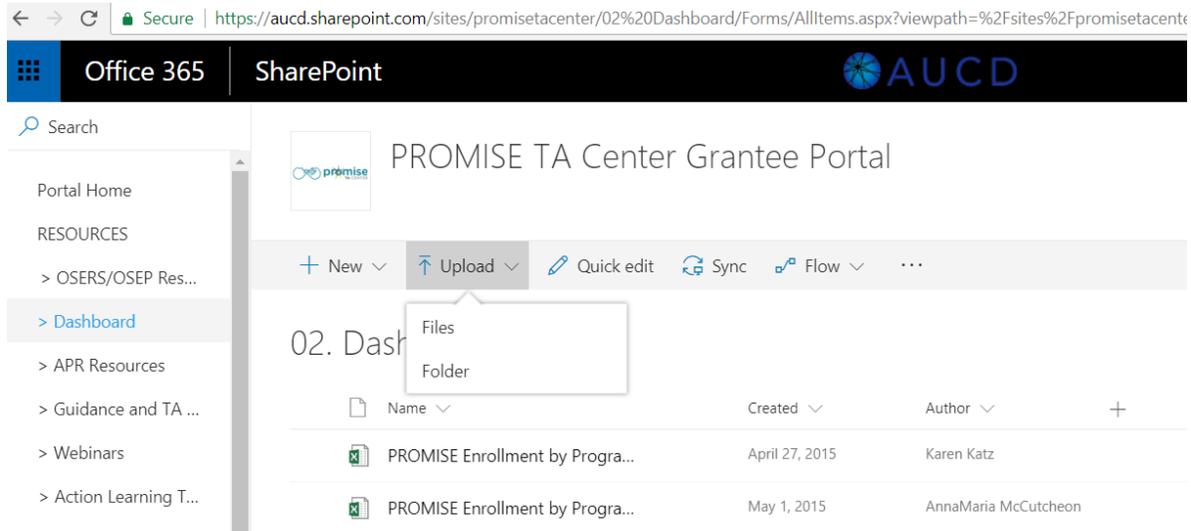
To post files or documents into one of the above libraries, first, in the left-hand menu, select that library.



This opens the Document Library (the screenshot above displays the Portal’s Dashboard). Just like a real library, each entry is an exclusive item. The Document Library will hold all types of files, even media. Folders can contain documents and other files that can be viewed, edited, copied, and downloaded to computers.

To Upload a New File

- 1. Create your new file, and save it somewhere on your local machine.
- 2. In you selected SharePoint Document Library, click **Upload** and select the **File** option to add the file you created to the document library.



3. The document is now available in the SharePoint document library. You may see your screen refresh to indicate that the file has uploaded. Files can now be viewed, edited or even deleted.

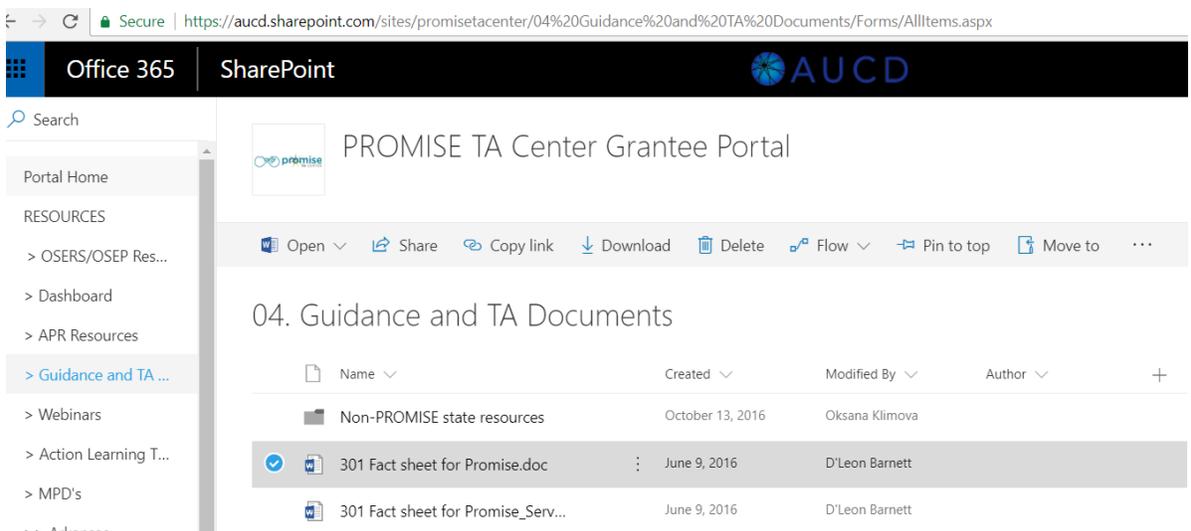
Tip: If the file is a Microsoft Word document and you do not want others to edit it, change it to a PDF file before uploading.

To View a File

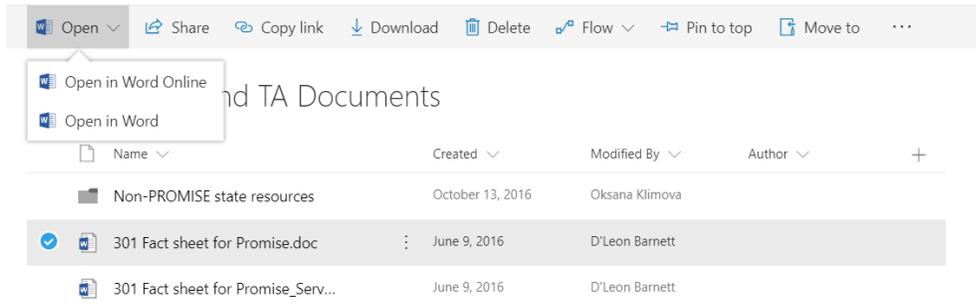
Select/click file and it will open. You may be prompted to enter your username and password again. This is normal and does not indicate a problem with the system.

To Edit a File

1. Select the file by mousing over the file’s name and clicking on the radio-circle to the left of the file’s name. A document edit bar will show up at the top of the document list.



1. From Document edit bar select 'Open'. You will have two options (SharePoint will display the application that was used for creating the document. In our example it's Word):
 1. Open in Word Online
 2. Open in Word.



Microsoft Word Online lets you make basic edits and formatting changes to your document in a web browser. We recommend you use that option if you do not have Microsoft Word 2016 installed on your computer.

Word Online opens documents in these formats:

- Word Document (.docx)
- Word Template (.dotx)
- Word 97-2003 Document (.doc)
- Portable Document Format (PDF)

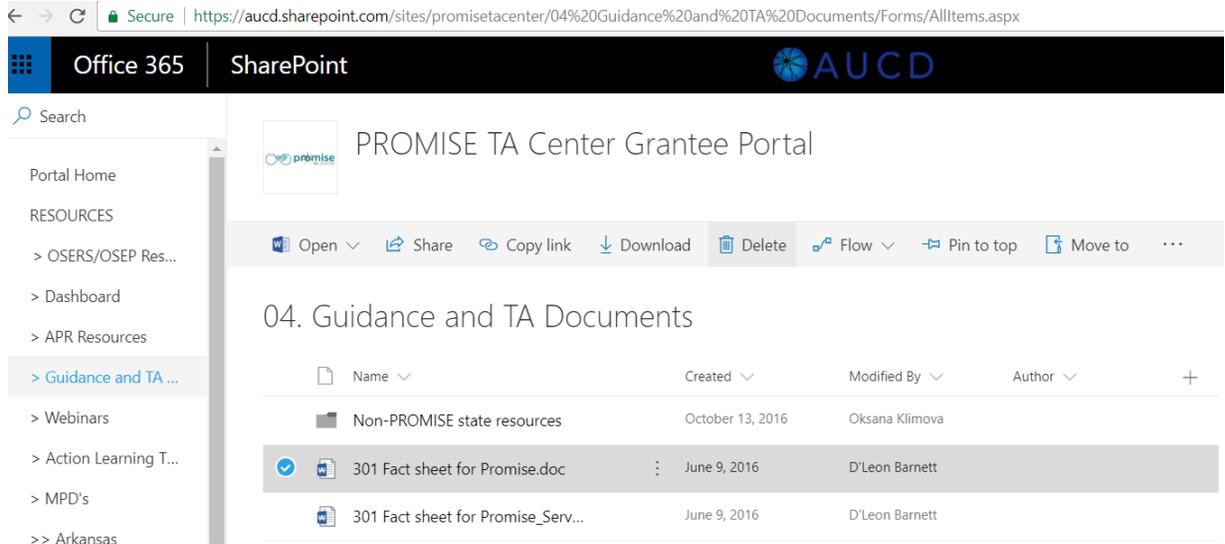
Word Online can't open documents in other file formats.

The document you open in Word Online is the same as the document you open in the Word desktop app, but some features work slightly differently in the two environments. You can read [documentation on those differences between using a document in the browser and in Word.](#)

Attention: The Track Changes feature does not work well in Word Online. If you make changes and you want to notify a team about those, you will need to add Comment(s).

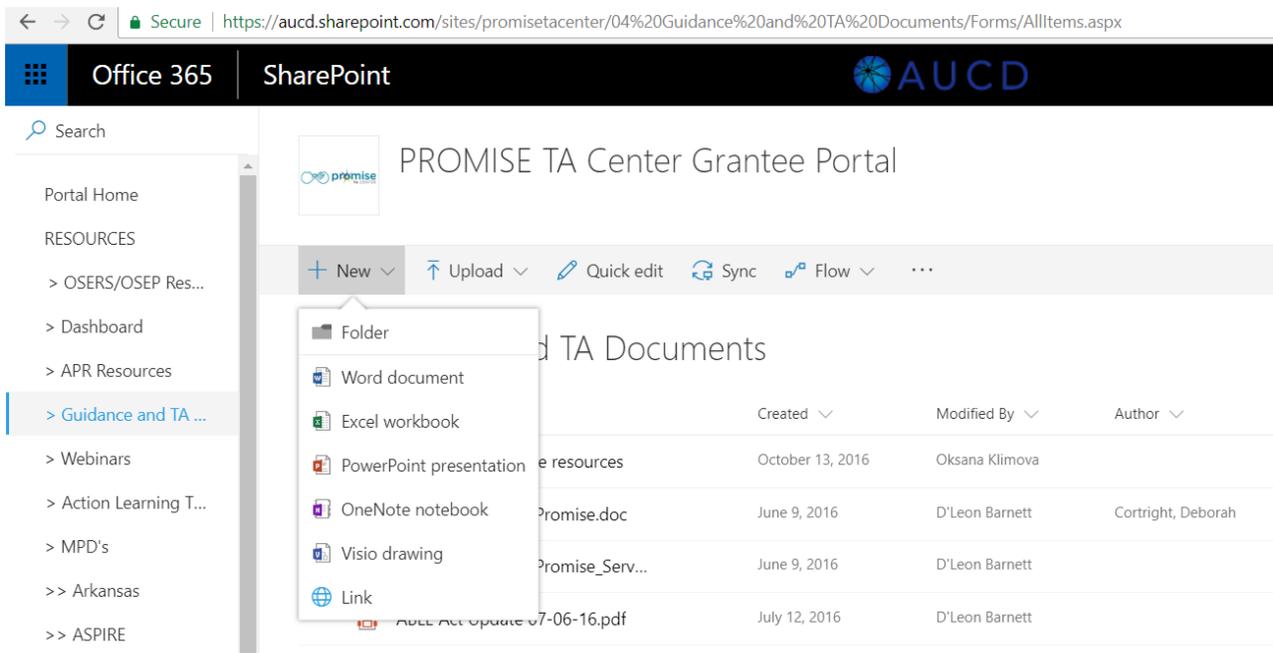
To Delete a File

Select file by clicking the radio-circle to the left of the file's name and click the **Delete** link in the document edit bar located above the list of files. After the confirmation on file deletion, the file will be sent to the Recycle Bin (same concept as the Trash Bin on your computer).



To Create Folder

Select tab '+ New' and select 'Folder'.



Click on the 'New Folder' icon and in the 'New Folder' form provide a name for the folder. Then click 'Save'.

Alerts

Reasons why you would set up SharePoint alerts

Here are few of them:

- You collaborate with your team on a document and want to be notified of changes to it;
- You utilize a document library and want to know when team members upload new documents;
- You want to keep an eye out and make sure your team members do not accidentally delete file(s) from a document library;
- You want to monitor for activity/changes in a document library or list.

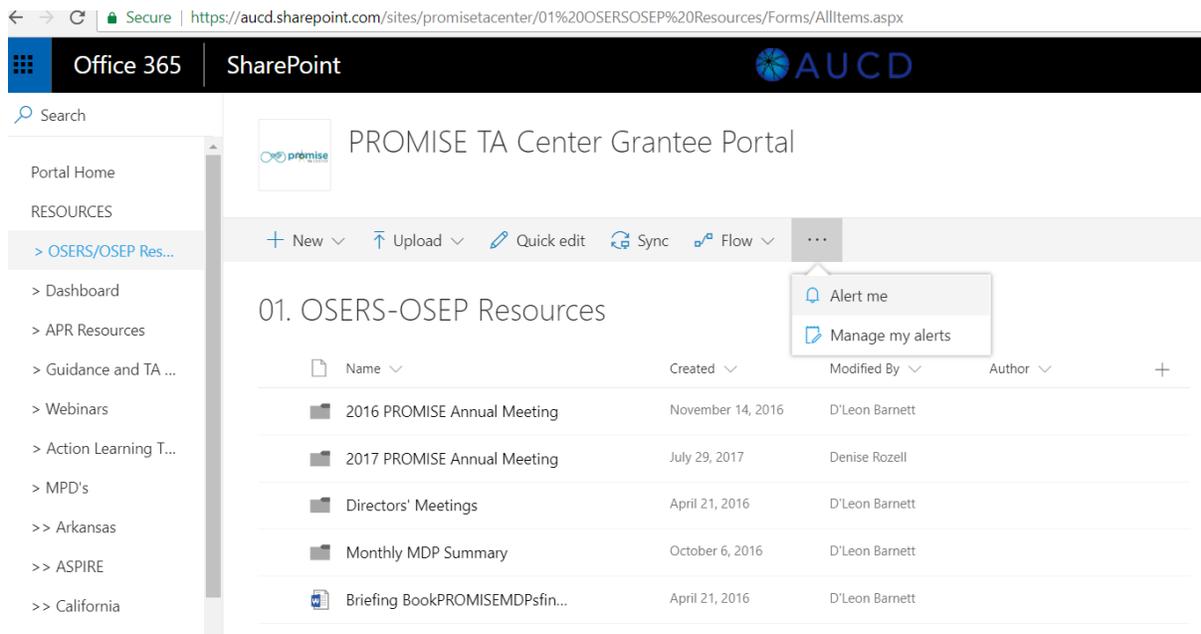
Creating Alerts in Document Library

In order to participate fully in the collaborative features of SharePoint, members will have to create individual alerts for their preferences. To receive email alerts on posted documents, a member will create an alert for those libraries.

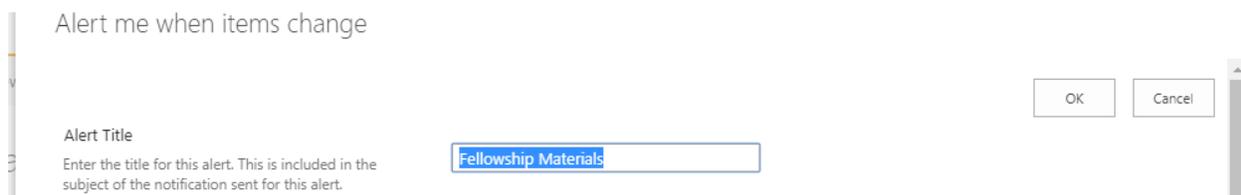
Alerts can be created at any time; however, it is recommended that they be created upon first access to the site.

How To Create an Alert:

Navigate to the list or library you want to set an alert for. From the top ribbon, click on the button with three dots.



Click **“Alert me”**. A new screen will pop up. This is where you set up all the characteristics of your 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

Send Alerts for These Changes
Specify whether to filter alerts based on specific criteria. You may also restrict your alerts to only include items that show in a particular view.

Send me an alert when:

Anything changes

Someone else changes a document

Someone else changes a document created by me

Someone else changes a document last modified by me

When to Send Alerts
Specify how frequently you want to be alerted. (mobile alert is only available for immediately send)

Send notification immediately

Send notification immediately

Send a daily summary

Send a weekly summary

Time:

Alert Title: This is where you give a name for your alert so it is something meaningful to you (whatever the name you give it here will appear in the subject and body of the email you will be getting later, so be creative.)

Send Alerts to: This is obvious, but you can also add other users as well. The emails you specify should be from users in the portal; you can't add just any emails in here. In most of cases, you just skip this section as you are probably setting it up for yourself.

Delivery Method: This defaults to your email. You can also get text alerts, but that requires additional admin configuration so it is not recommended.

Change Type: Here you can specify what kind of behavior should trigger an alert. For example, if you are concerned about file deletions – just make sure you check off that option.

Send Alerts for These Changes: This is where you can filter the alerts even further. For example, if you are only concerned about documents you created or modified -- this is the area where you do this.

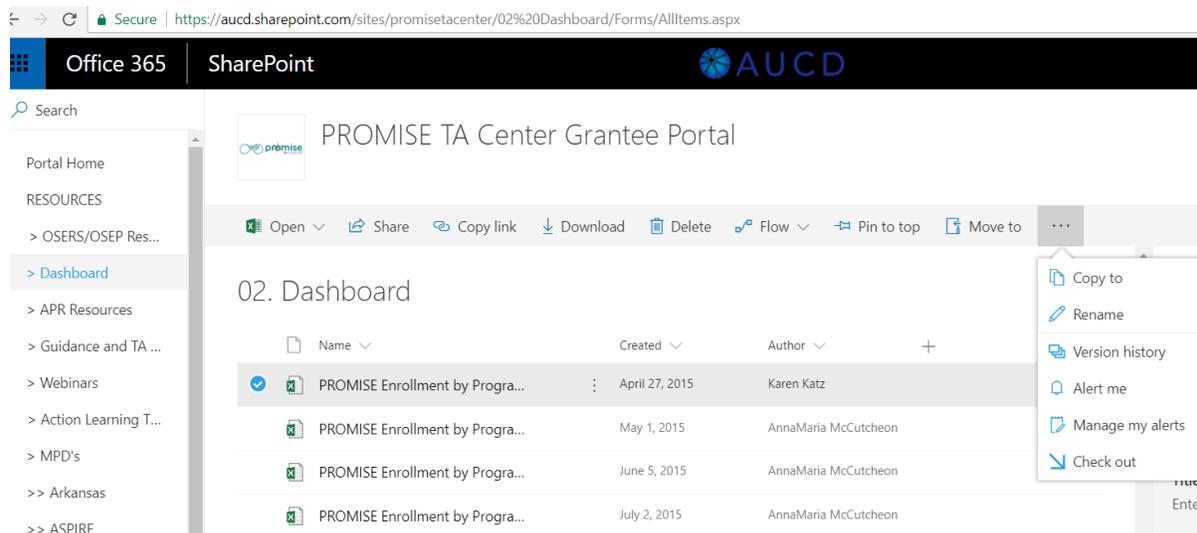
When to Send Alerts: This is where you set the frequency. If you want an alert to be sent immediately or once a day/week – check off the appropriate radio button.

Don't forget to click **OK**. You will get an email from the system confirming that you have successfully created an alert.

How to Create SharePoint Alerts on the Single File or Folder

The process for creating an alert for an individual item and not the whole list or library is pretty much identical to creating a document alert except for the first step.

Click on the radio-button next to the file or item you want to create a SharePoint alert for. On the ribbon, now, select the "three dots" option. Then choose 'Alert Me' on this document and from there just follow the steps as outlined above.



How to Modify or Delete an Alert

Navigate to the ribbon as if you are setting up a new alert, and select 'Manage My Alerts'. You can click on the name of the alert you want to **modify** or hit a checkbox next to it and click **delete**, if you no longer want to receive notifications.

 [Add Alert](#) |  [Delete Selected Alerts](#)

Alert Title

Frequency: Immediate

[Fellowship Materials](#)