

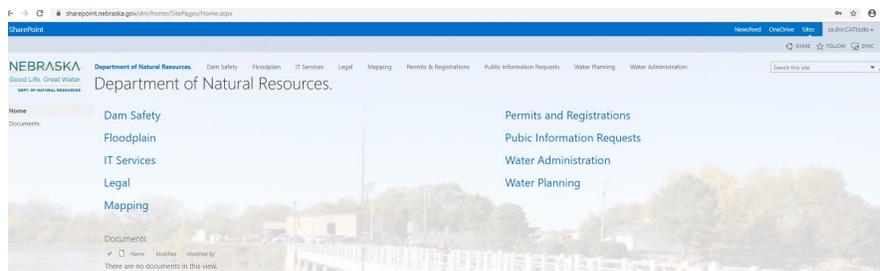
# SharePoint Help Document

## Contents

Location .....	1
Training.....	1
Request Users and/or Access.....	2
Working with Documents .....	2
Post a document .....	2
Add/Create a new document .....	3
Deleting Documents/Folders .....	3
Sharing Documents.....	4
Editing Documents .....	7
Versioning .....	8
Subsites/Additional Pages .....	8
Working with SharePoint documents using File Explorer .....	8
Move or Copy document to new location.....	10
Set up Alerts on pages.....	11
SharePoint: Configure Document Library So PDFs Open as PDFs (Instead of in Built-In Word Editor).....	12
Custom Lists to Excel.....	14

## Location

<https://sharepoint.nebraska.gov/dnr/home/SitePages/Home.aspx>



## Training

1. General Information
  - a. <https://sharepoint.nebraska.gov/ocio/home/training/SitePages/Home.aspx>. Set up by OCIO for users. There are also some short articles/videos on the left.

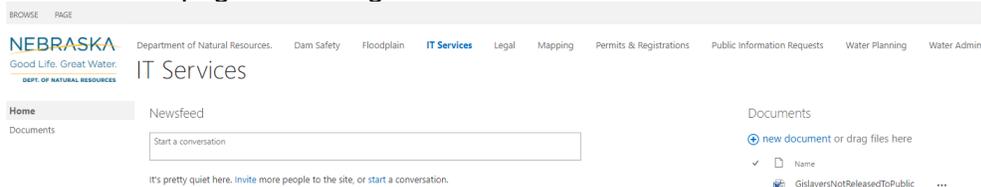
- b. LinkedIn Learning through Employee Development Center (link on above site)-  
<https://nebraska.csod.com/client/nebraska/default.aspx?ReturnUrl=https%3a%2f%2fnebraska.csod.com%2fLMS%2fLoDetails%2fDetailsLo.aspx%3floid%3dd713ff35-1a5a-4329-baad-78aae0e317d9#t=1>
2. Co-authoring/versions <https://support.office.com/client/training-introduction-to-document-libraries-2689f967-3c61-4535-a38a-a20c313d55e6?NS=WSENDUSER&Version=15&AppVer=OSU150>

## Request Users and/or Access

1. All DNR employees have read only access to the site.
2. Read/Write/Delete/Add granted to sections on section specific pages.
3. Users must be granted access to site/pages/documents
4. Request a new user. Complete a DNR Service request through OCIO Service Portal Requests. Include:
  - a. Name including middle initial (in case it is a duplicate name)
  - b. Email address
  - c. Phone number
  - d. Where they need access
5. **Login** with your stn credentials, first.lastname and use your password you setup. If you cannot get in, try adding "stn\" to your login, ex. stn\first.lastname

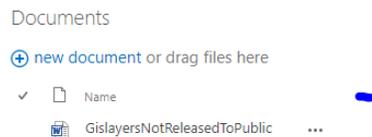
## Working with Documents

Each section page was designed with a Newsfeed area and a Documents area.



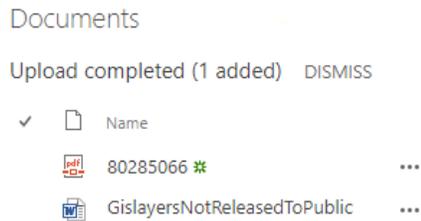
### Post a document

1. Drag files to folder area



2. Message will display when moving document over area, "Drop Here".

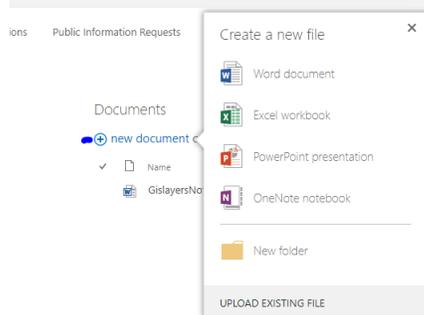
- When document has uploaded, message will display, "Upload Completed"



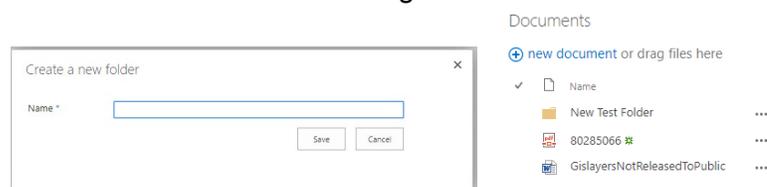
- DISMISS just removes the upload message.
- Cannot post to areas where permission not granted

### Add/Create a new document

- Select new document on right side of page



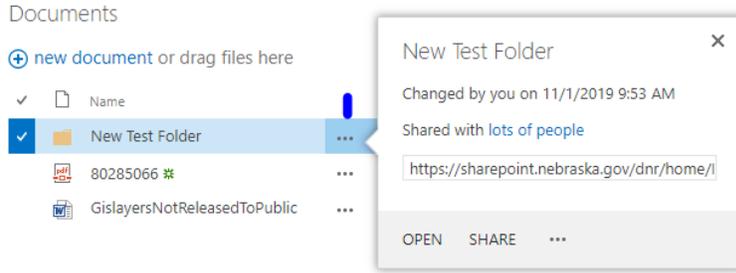
- Select file type.
  - Word document
  - Excel workbook
  - PowerPoint presentation
  - OneNote notebook
  - New folder – create folder under new documents area.
    - New folders allow for better organization



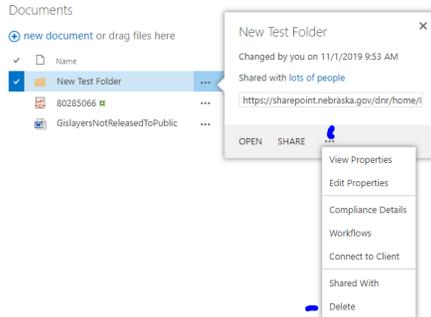
- Word, Excel, PowerPoint and OneNote:
  - Name the document
  - Will open in a web version to create a new document
  - Saving is just to SharePoint.
- Cannot add to areas where permission not granted

### Deleting Documents/Folders

- Click the ellipses "... " next to document or folder



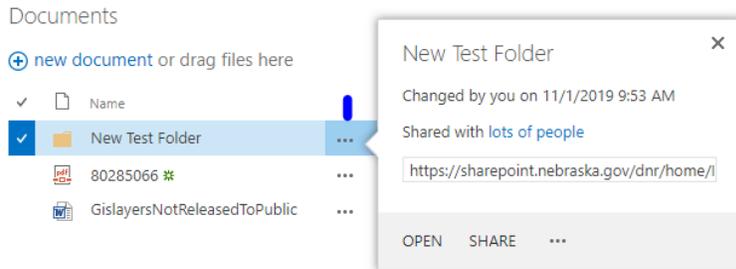
2. Click the ellipses “...” in box that opens up



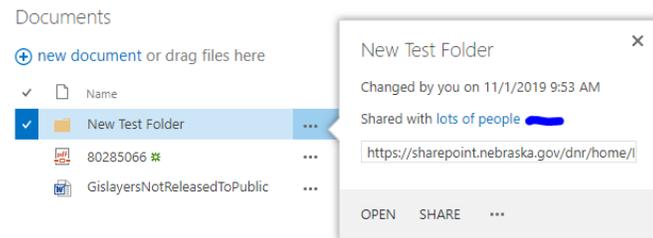
3. Cannot delete other users documents

### Sharing Documents

1. Click the ellipses “...” next to document or folder

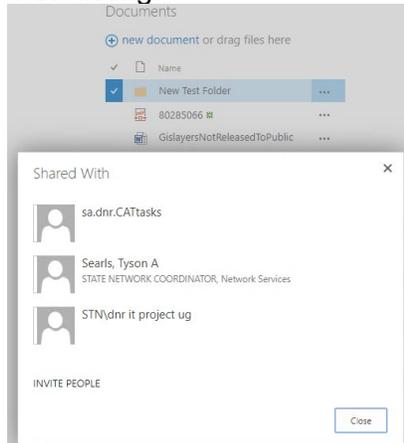


2. See who it is shared with and then send email to share

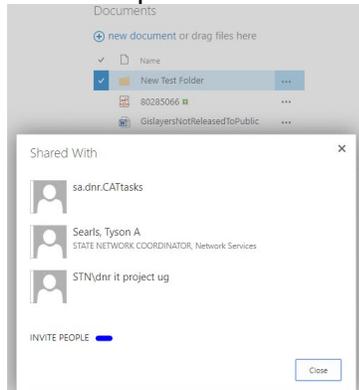


a. Click on “lots of people”

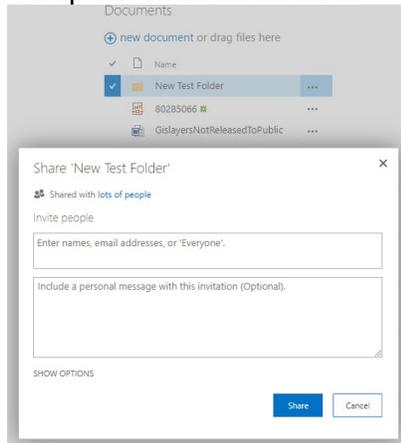
b. View listing



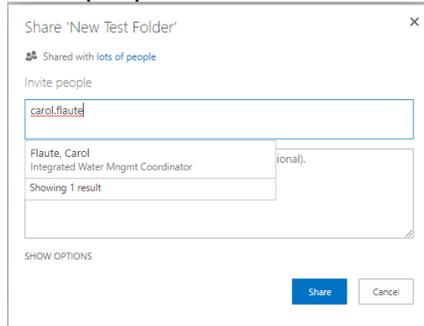
c. Invite People



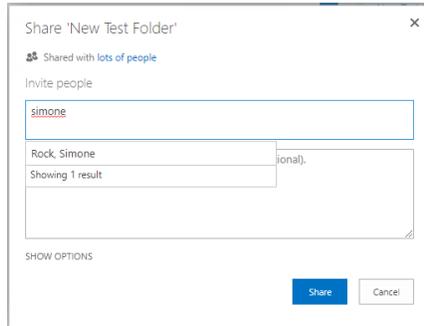
d. Complete email information



- e. Invite people with an AD account, name must be within drop down

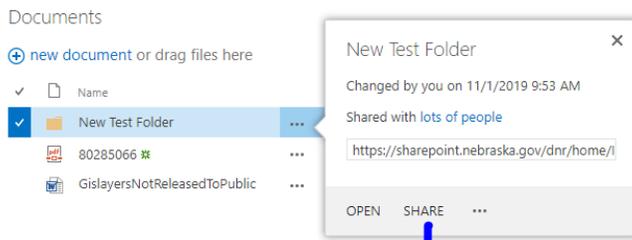


- f. Outside individuals with AD accounts also show up on the list



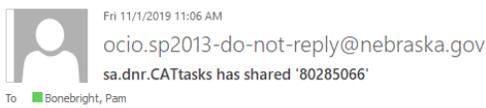
- g. Cannot invite people without AD account

### 3. Send email to share



- a. See emailing information directly above

### 4. Email received



Test message for use in Help Document

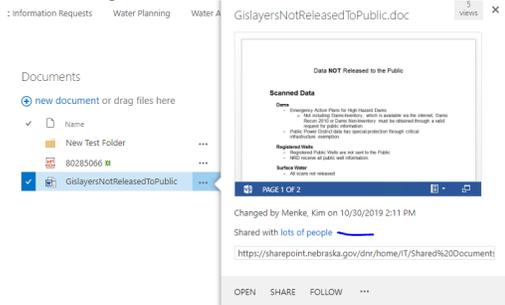
Open [80285066.pdf](#)

Follow this document to get updates in your newsfeed.

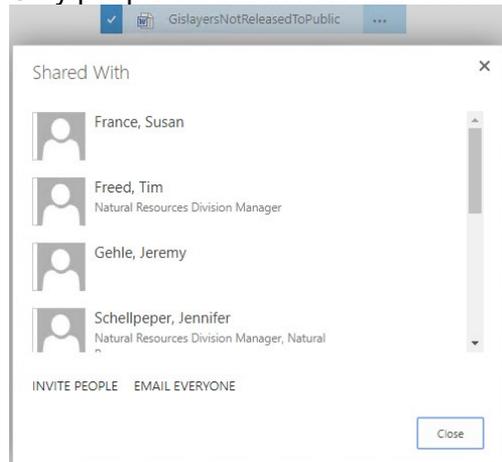
- a. Click on link in email to go directly to the document

## Editing Documents

### 1. Can only edit documents shared with user.

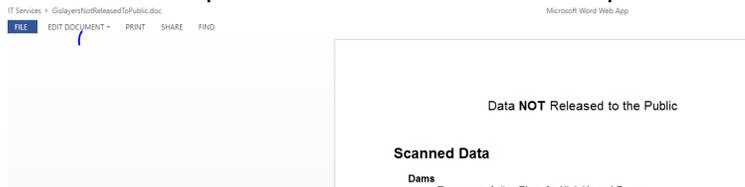


#### a. Only people on this list can edit document

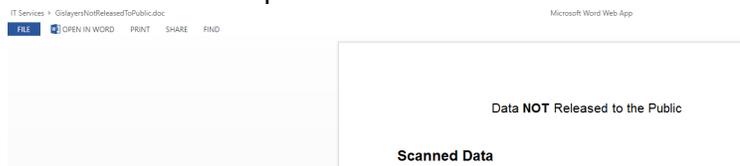


#### b. Can easily communicate with everyone the document is shared with by using Email Everyone.

### 2. Shared users open a document and have edit permissions



### 3. Non-shared users open a document and can view it.



## Versioning

Sites can be set up for versioning. This is not a default setting. The following are the options available:

### Settings › Versioning Settings

#### 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

#### Document Version History

Specify whether a version is created each time you edit a file in this document library. [Learn about versions.](#)

Create a version each time you edit a file in this document library?

No versioning  
 Create major versions  
 Example: 1, 2, 3, 4  
 Create major and minor (draft) versions  
 Example: 1.0, 1.1, 1.2, 2.0

Optionally limit the number of versions to retain:

Keep the following number of major versions:  
  
 Keep drafts for the following number of major versions:

#### 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 document library. [Learn about specifying who can view and edit drafts.](#)

Who should see draft items in this document library?

Any user who can read items  
 Only users who can edit items  
 Only users who can approve items (and the author of the item)

#### Require Check Out

Specify whether users must check out documents before making changes in this document library. [Learn about requiring check out.](#)

Require documents to be checked out before they can be edited?

Yes  No

## Subsites/Additional Pages

The screenshot shows a SharePoint site for the Nebraska Department of Natural Resources. The top navigation bar includes links for Department of Natural Resources, Dam Safety, Floodplain, IT Services, Legal, Mapping, Permits & Registrations, Public Information Requests, and Water Planning. The main content area is titled "Water Planning" and features a "Home Documents" section with a list of subsites: BlueBasin, NPDC, POAC, and PRRIP. Below this is a "Newsfeed" section with the text "It's pretty quiet here. Invite more people to the site." On the right side, there is a "Documents" section with a "Home" link and the text "There are no documents in this view."

1. Subsites can be added below section pages
2. Subsites can be set up with unique permissions
3. Access to a subsite does not give user access to any other part of the site.

## Working with SharePoint documents using File Explorer

To access documents and move documents around on SharePoint using file explorer, setting up mapped network drives is an easy option. You need Contribute permissions to the page, home page does not work.

The network drive is mapped from just part of the address of the page. Only map yellow highlighted area.

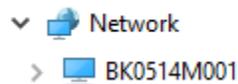
[https://sharepoint.nebraska.gov/dnr/home/diroffice/dirrev/\\_layouts/15/start.aspx#/SitePages/Home.aspx](https://sharepoint.nebraska.gov/dnr/home/diroffice/dirrev/_layouts/15/start.aspx#/SitePages/Home.aspx)

Steps to take:

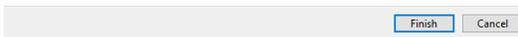
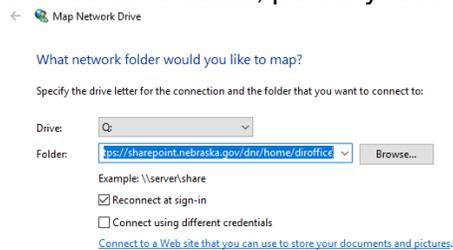
1. Copy website address, but only up to folder that you want to map, not the entire url. Can NOT map to Home (DNR main page) due to file permissions. To map WP sharepoint page use this part of the url <https://sharepoint.nebraska.gov/dnr/home/WP/>, **NOT** entire address

[https://sharepoint.nebraska.gov/dnr/home/WP/\\_layouts/15/start.aspx#/SitePages/Home.aspx](https://sharepoint.nebraska.gov/dnr/home/WP/_layouts/15/start.aspx#/SitePages/Home.aspx)

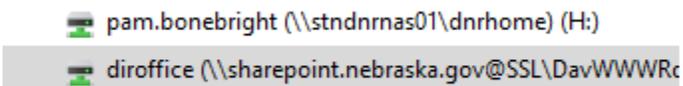
2. Open File explorer
3. Network



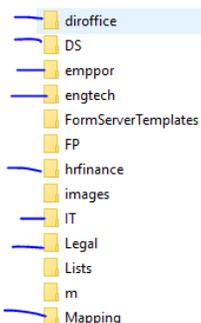
4. Right click on Network, Map Network Drive
5. Choose drive name, pick any letter not already assigned.



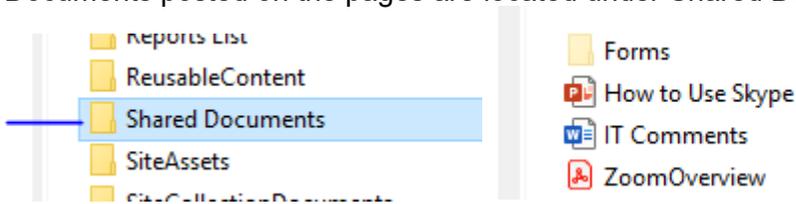
6. Finish.
7. It might ask for log in information when you try to log in after your computer has been disconnected from state system or rebooted.
8. Final look



9. Opening in File Explorer. Pages are listed as folders

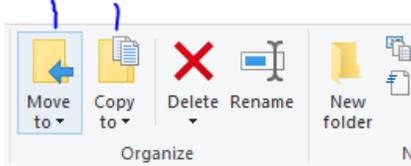


10. Documents posted on the pages are located under Shared Documents

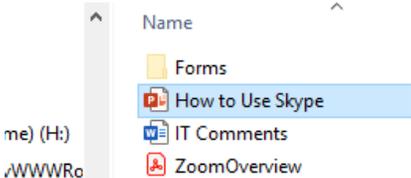


Move or Copy document to new location

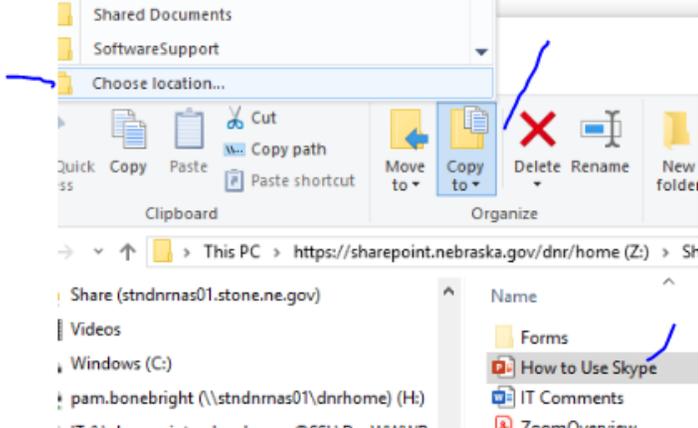
- 1. Move only works if you posted the document. Otherwise you can copy and delete documents if you have edit permissions in folders.



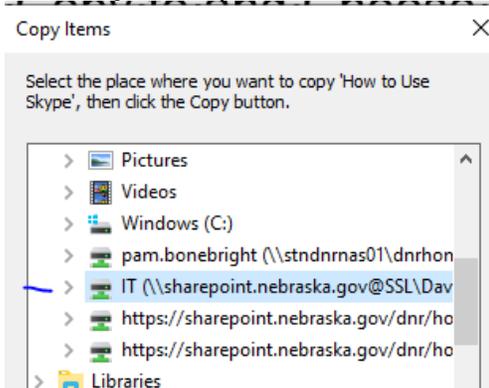
sharepoint.nebraska.gov/dnr/home (Z:) > Shared



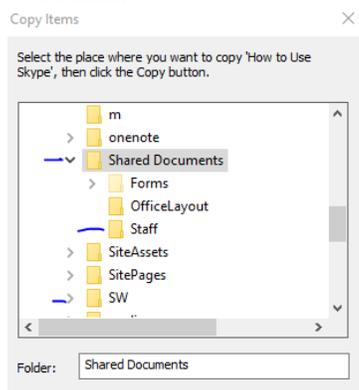
- 2. Highlight document(s), select Copy to and Choose location...



- 3. Choose your map drive



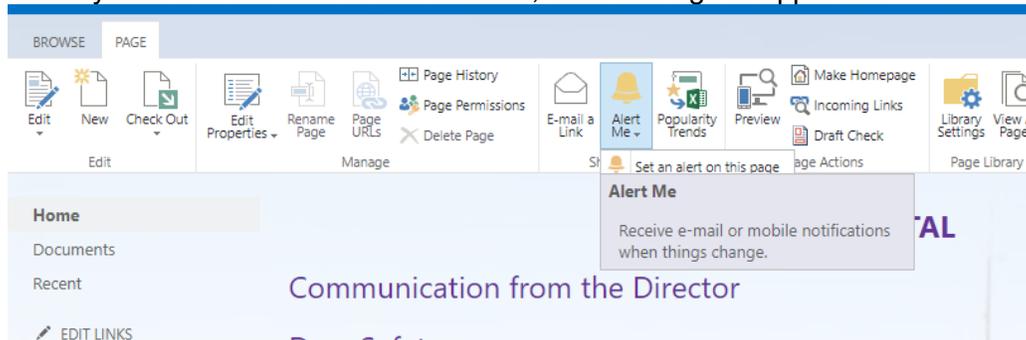
4. To post under documents choose Shared Documents or subsites, further down to folder if needed.



## Set up Alerts on pages

To set up an alert on a page, this is done by the individual.

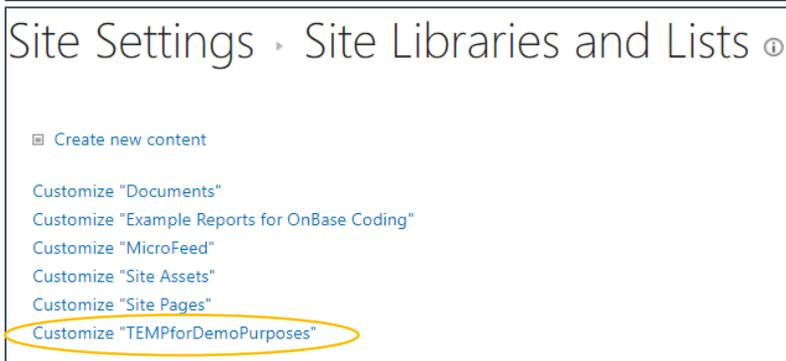
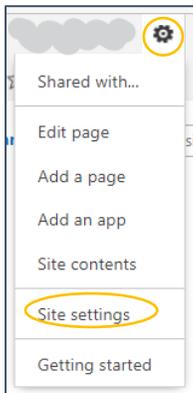
1. When you are at the SharePoint location, click on Page in upper left.



2. Then click on Alert Me.
  - a. Set an alert on this page, options will open that you are able to choose from.
  - b. Manage My Alerts

## SharePoint: Configure Document Library So PDFs Open as PDFs (Instead of in Built-In Word Editor)

1. Open the settings page for the Document Library. There are multiple ways to get the Document Library's settings page; one is to open "Site Settings," then click "Site libraries and lists," then "Customize "[theNameOfYourLibrary]". In this example, the Document Library is called "TEMPforDemoPurposes."



2. On the settings page for the Document Library, click “Advanced Settings.”

TEMPforDemoPurposes > Settings

List Information

**Name:** TEMPforDemoPurposes

**Web Address:** https://sharepoint.nebraska.gov/dnr/home/WP/intranet/TEMPforDemoPurposes/Forms/AllItems.aspx

**Description:**

General Settings

Permissions and Management

- List name, description and navigation
- Versioning settings
- Advanced settings
- Column default value settings
- Audience targeting settings
- Rating settings
- Form settings

- Delete this document library
- Save document library as template
- Manage files which have no checked in version
- Workflow Settings
- Generate file plan report
- Enterprise Metadata and Keywords Settings
- Information management policy settings

3. In the Advanced Settings, next to “Opening Documents in the Browser,” select “Open in the client application.”

Settings > Advanced Settings

Content Types

Specify whether to allow the management of content types on this document library. Each content type will appear on the new button and can have a unique set of columns, workflows and other behaviors.

Allow management of content types?

Yes  No

Document Template

Type the address of a template to use as the basis for all new files created in this document library. When multiple content types are enabled, this setting is managed on a per content type basis. [Learn how to set up a template for a library.](#)

Template URL:

TEMPforDemoPurposes/Forms/template.do

(Edit Template)

Opening Documents in the Browser

Specify whether browser-enabled documents should be opened in the client or browser by default when a user clicks on them. If the client application is unavailable, the document will always be opened in the browser.

Default open behavior for browser-enabled documents:

Open in the client application

Open in the browser

Use the server default (Open in the browser)

Custom Send To Destination

Type the name and URL for a custom Send To destination that you want to appear as an option for this list. It is recommended that you choose a short name for the destination.

Destination name: (For example, Team Library)

URL:

4. Scroll to the bottom of the Advanced Settings page and click “OK” to save your changes.



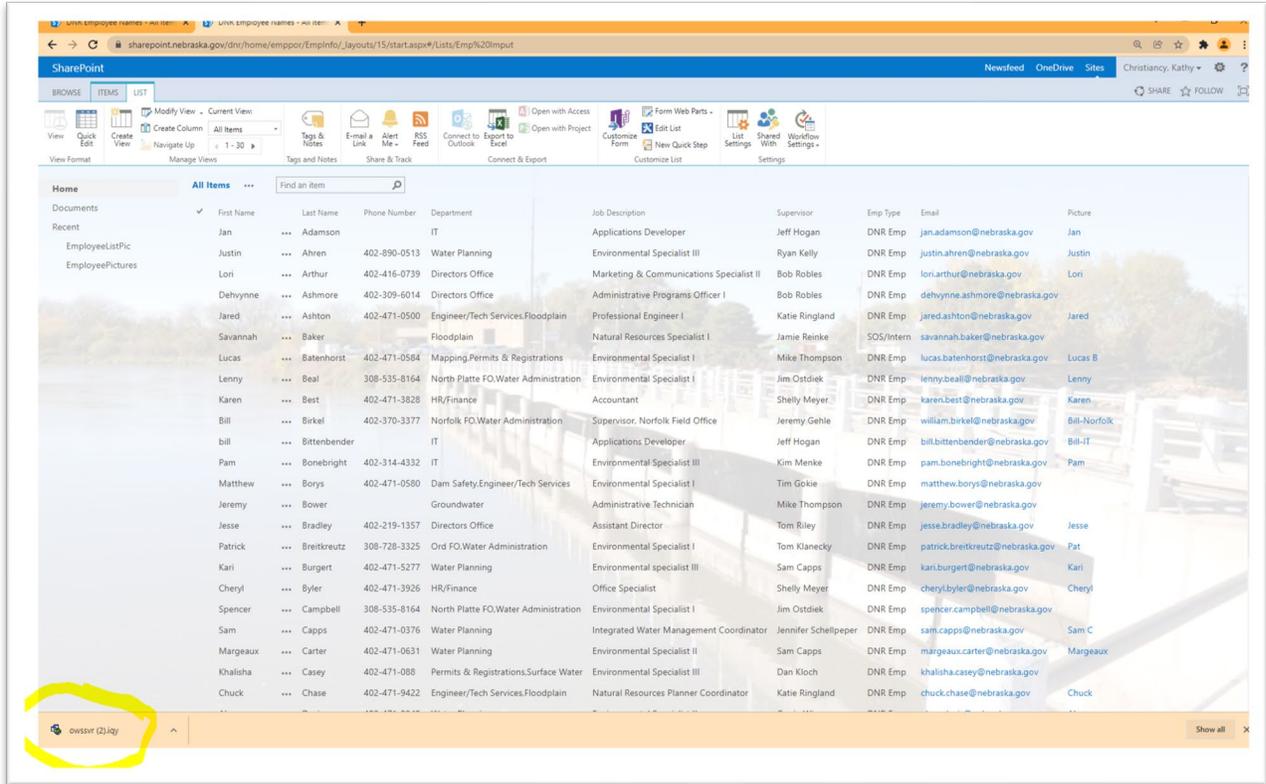
## Custom Lists to Excel

Export a custom list to Excel:

Navigate to your custom list and click the List tab to expose the ribbon. It will present a panel telling you must have a Microsoft SharePoint Foundation Compatible application. Click ok.

First Name	Last Name	Phone Number	Department	Job Description	Supervisor	Emp Type	Email	Picture
Jan	Adamson		IT	Applications Developer	Jeff Hogan	DNR Emp	jan.adamson@nebraska.gov	Jan
Justin	Ahren	402-890-0513	Water Planning	Environmental Specialist III	Ryan Kelly	DNR Emp	justin.ahren@nebraska.gov	Justin
Lori	Arthur	402-416-0739	Directors Office	Marketing & Communications Specialist II	Bob Robles	DNR Emp	lori.arthur@nebraska.gov	Lori
Dehymne	Ashmore	402-309-6014	Directors Office	Administrative Programs Officer I	Bob Robles	DNR Emp	dehymne.ashmore@nebraska.gov	
Jared	Ashton	402-471-0500	Engineer/Tech Services.Floodplain	Professional Engineer I	Katie Ringland	DNR Emp	jared.ashton@nebraska.gov	Jared
Savannah	Baker		Floodplain	Natural Resources Specialist I	Jamie Reinke	SOS/Intern	savannah.baker@nebraska.gov	
Lucas	Batenhorst	402-471-0584	Mapping/Permits & Registrations	Environmental Specialist I	Mike Thompson	DNR Emp	lucas.batenhorst@nebraska.gov	Lucas B
Lenny	Beal	308-535-8164	North Platte FO,Water Administration	Environmental Specialist I	Jim Ostdiek	DNR Emp	lenny.beall@nebraska.gov	Lenny
Karen	Best	402-471-3828	HR/Finance	Accountant	Shelly Meyer	DNR Emp	karen.best@nebraska.gov	Karen
Bill	Birkel	402-370-3377	Norfolk FO,Water Administration	Supervisor, Norfolk Field Office	Jeremy Gehle	DNR Emp	william.birkel@nebraska.gov	Bill-Norfolk
bill	Bittenbender		IT	Applications Developer	Jeff Hogan	DNR Emp	bill.bittenbender@nebraska.gov	Bill-IT
Pam	Bonebright	402-314-4332	IT	Environmental Specialist III	Kim Menke	DNR Emp	pam.bonebright@nebraska.gov	Pam
Matthew	Borys	402-471-0580	Dam Safety,Engineer/Tech Services	Environmental Specialist I	Tim Gokie	DNR Emp	matthew.borys@nebraska.gov	
Jeremy	Bower		Groundwater	Administrative Technician	Mike Thompson	DNR Emp	jeremy.bower@nebraska.gov	
Jesse	Bradley	402-219-1357	Directors Office	Assistant Director	Tom Riley	DNR Emp	jesse.bradley@nebraska.gov	Jesse
Patrick	Breitkreutz	308-728-3325	Ord FO,Water Administration	Environmental Specialist I	Tom Klanecky	DNR Emp	patrick.breitkreutz@nebraska.gov	Pat
Kari	Burgert	402-471-5277	Water Planning	Environmental specialist III	Sam Capps	DNR Emp	kari.burgert@nebraska.gov	Kari
Cheryl	Byler	402-471-3926	HR/Finance	Office Specialist	Shelly Meyer	DNR Emp	cheryl.byler@nebraska.gov	Cheryl
Spencer	Campbell	308-535-8164	North Platte FO,Water Administration	Environmental Specialist I	Jim Ostdiek	DNR Emp	spencer.campbell@nebraska.gov	
Sam	Capps	402-471-0376	Water Planning	Integrated Water Management Coordinator	Jennifer Schellpeper	DNR Emp	sam.capps@nebraska.gov	Sam C
Margeaux	Carter	402-471-0631	Water Planning	Environmental Specialist II	Sam Capps	DNR Emp	margeaux.carter@nebraska.gov	Margeaux
Khalisha	Casey	402-471-088	Permits & Registrations.Surface Water	Environmental Specialist III	Dan Kloch	DNR Emp	khalisha.casey@nebraska.gov	
Chuck	Chase	402-471-9422	Engineer/Tech Services.Floodplain	Natural Resources Planner Coordinator	Katie Ringland	DNR Emp	chuck.chase@nebraska.gov	Chuck
Alexa	Davis	402-471-3948	Water Planning	Environmental Specialist II	Carrie Wiese	DNR Emp	alexa.davis@nebraska.gov	Alexa
Jean	Eichhorst	402-314-8139	Water Planning		Ryan Kelly	SOS/Intern	jean.eichhorst@nebraska.gov	

Then you'll see it's created a download file, in your default download folder.



Then one more panel, click enable and it will populate the file. You can see where it will be on the File path.

