# Guides Queensland SharePoint Manual

For Region, District and Campsite Managers

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# Aim and Scope of this Guide

This aim of this guide is to provide information to help Region, District and Campsite managers to access and use their GGQ SharePoint Document Library.

# 1.0 What is SharePoint?

SharePoint is a secure web-based application that allows organisations to store and organise any content and information including documents, images and videos.

# 2.0 Why we must use SharePoint instead of personal computers

## 2.1 Security

All documents within the GGQ SharePoint library are backed up daily so in the case of a technical failure, we can recover documents from backup systems. This may not be possible if your personal computer has technical issues.

## 2.2 Privacy

Under The Privacy Act 1988, we have a legal obligation to take all reasonable steps to protect the privacy of our members and to keep their data confidential. The GGQ SharePoint library is a closed, secure system and therefore GGQ documents are protected from interference, loss or exposure to parties outside the GGQ SharePoint library. This is not the case when using personal computers to store GGQ documents.

## 2.3 Continuity

When we have a transition period with one Leader leaving and a new one taking over the role, all documents are safely stored in the GGQ SharePoint library which can be easily accessed by the new DM and the old DM account can be deactivated. This means there is no risk of losing GGQ information that was stored in a previous DM's personal computer and there is no delay when onboarding a new DM.

# 3.0 Microsoft 365 – The Parent System

## 3.1 Understanding the relationship between Microsoft 365 and SharePoint

Microsoft 365 is a product that provides access to several online Microsoft applications. Once you are signed in to Microsoft 365 you will be able to access a range of individual apps available to you e.g. Email, SharePoint and Teams. In this document we will cover the use of SharePoint. We will discuss other individual apps in separate documents.

# 4.0 Signing in to Microsoft 365

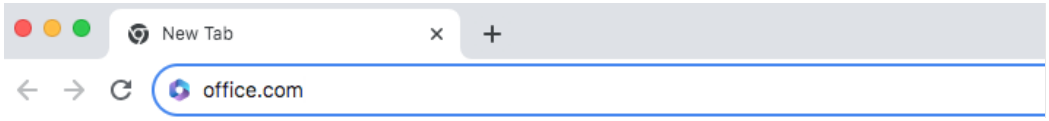
## 4.1 Signing in to Microsoft 365 in a web browser

You can access Microsoft 365 from any web browser – either on your computer or on your mobile device.

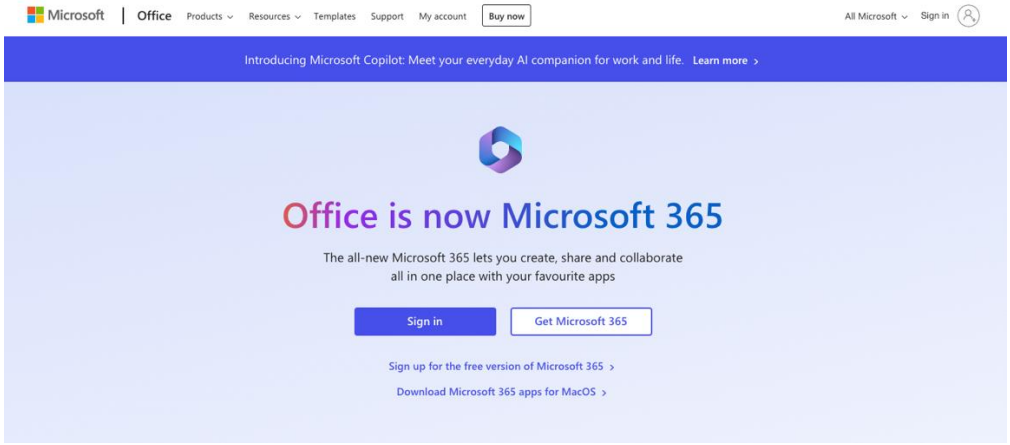
**This is the preferred method of accessing your Microsoft apps as it is a 'Cloud' based system which allows you to access Microsoft 365 from any computer or mobile device**.
*'Cloud based' means online where information is stored on servers (computers) in remote storage areas.*

1. Open your preferred web browser (Chrome, Edge, Safari etc)

2. Type **office.com** into the address bar and hit return

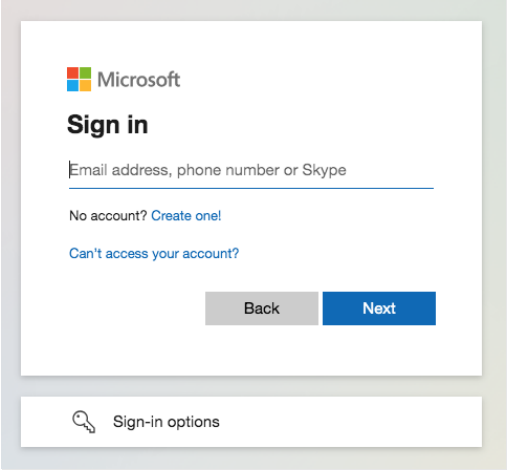



This will direct you to the Microsoft 365 sign in page, pictured below




3. Sign into Microsoft 365

Click on the 'Sign In' button to progress to the 'Sign in' window.




To sign in to Microsoft 365, you use the account that contains your name details, for example **JaneD@guidesqld.org**. If you haven't yet been given the details for that account, please contact webmaster@guidesqld.org to obtain that information.

Enter your email address and click next. You will be asked to enter your password. The password would have been provided to you when you were notified of your Guide's email address. This password is case sensitive.

## 4.2 Microsoft 365 two step verification

Like many organisations, we need to use two step verification to ensure we sign in securely to our Microsoft 365 system.

Two-step verification helps you to use your accounts more securely because passwords can be forgotten, stolen, or compromised. Two-step verification uses a second step like sending a code to your phone to make it harder for other people to break into your account.

The Microsoft Authenticator app is required to help you sign in to your GGQ account using two-step verification.

When you sign in for the first time, please follow the **Microsoft Authenticator guide** to set up two stage verification for your GGQ account.

When successfully signed in, you will be asked if you wish to stay signed in. If this is your personal computer, click 'YES,' if this is a public computer or one you do not use often, click NO.'

You will then be directed to the Microsoft 365 Start Window where you can select any of the different Microsoft 365 apps available to you.

**NOTE:** In GGQ Microsoft 365, Self-service password reset is not available. Users will need to contact GGQ's external IT service provider to reset the password. Details are listed in the Guiding Directory.

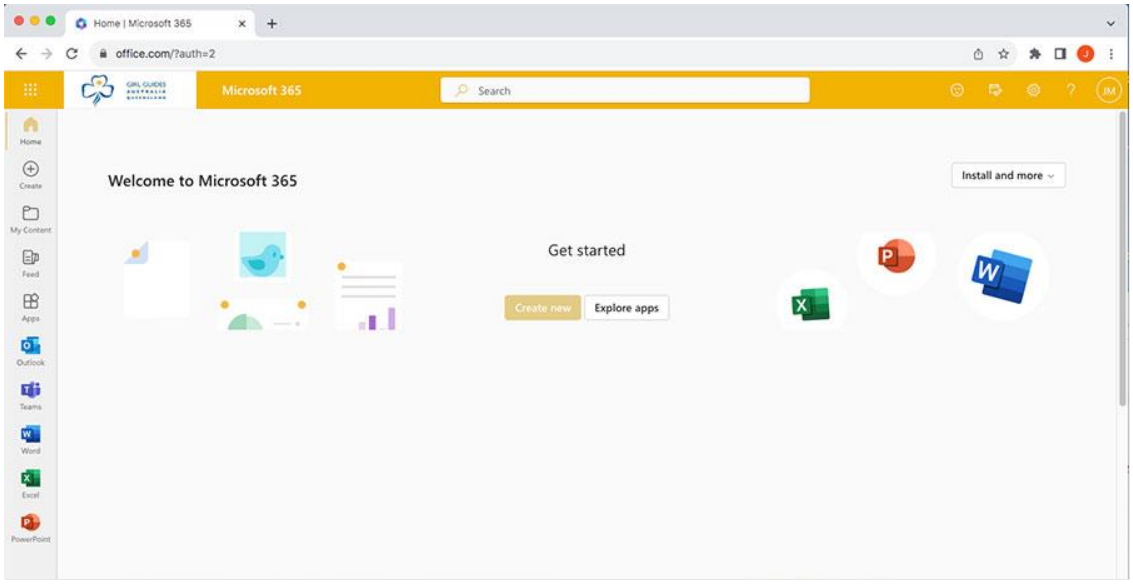
If you ever forget your password or sign in details, please contact webmaster@guidesqld.org.

**FAQ: What happens with the Modern Authentication If I get a new mobile phone?**
In that case, GGQ's external IT provider will need to delete your old phone number from the system and add your new phone number to your account which will prompt a new setup request.

If you need any assistance regarding the matter, please contact webmaster@guidesqld.org.

# 5.0 Opening SharePoint

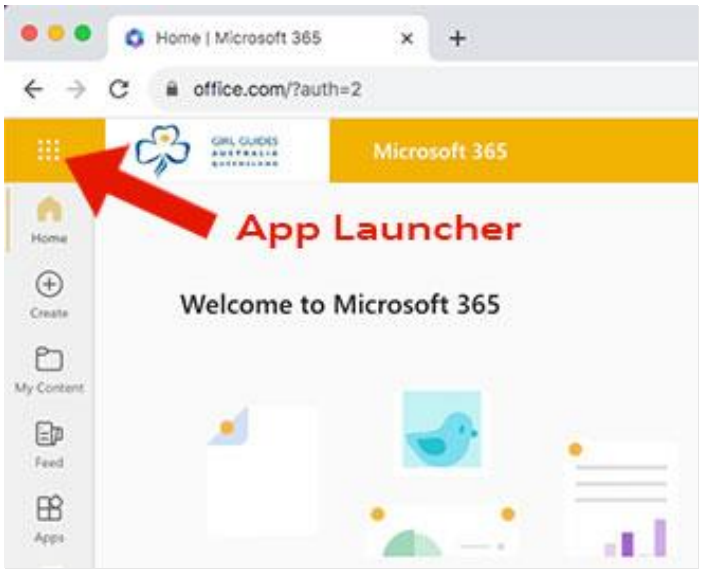
## 5.1 Navigating to SharePoint on a desktop browser



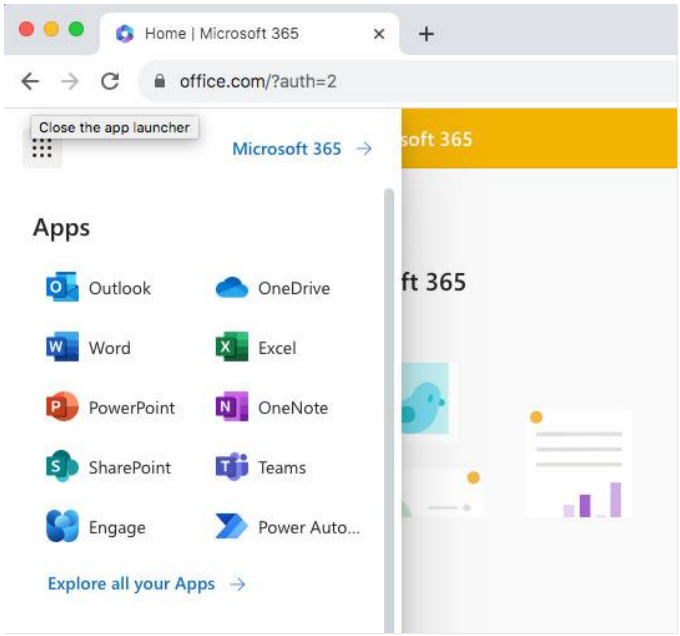

When you first sign in to Microsoft 365, you will see a window similar to the above. On the left-hand side of the window, you will see shortcut icons to some of your different Microsoft apps. In this manual we will focus on SharePoint – the Document Library. If you don't see a SharePoint icon on the left-hand side of the window, you can open SharePoint from open the App launcher.

If you are viewing SharePoint on a mobile device or small tablet, you will something similar to the following screen

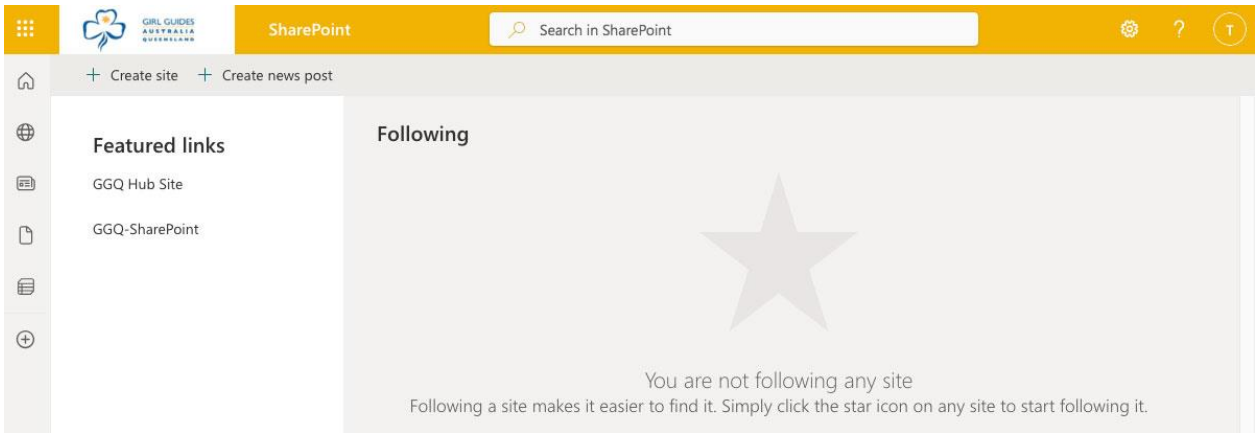
You can open your app launcher any time by clicking the 9 dots in the top left of your browser window.




When you click on the App launcher, it will show you all your app icons. Simply select the one you want to open.



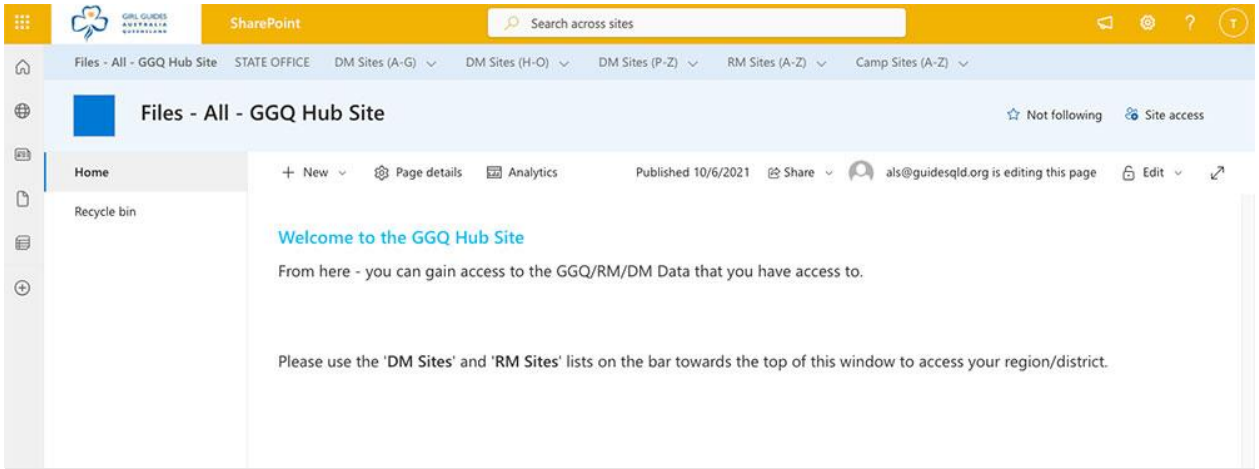

When you click on the SharePoint icon, SharePoint will open in a new tab;



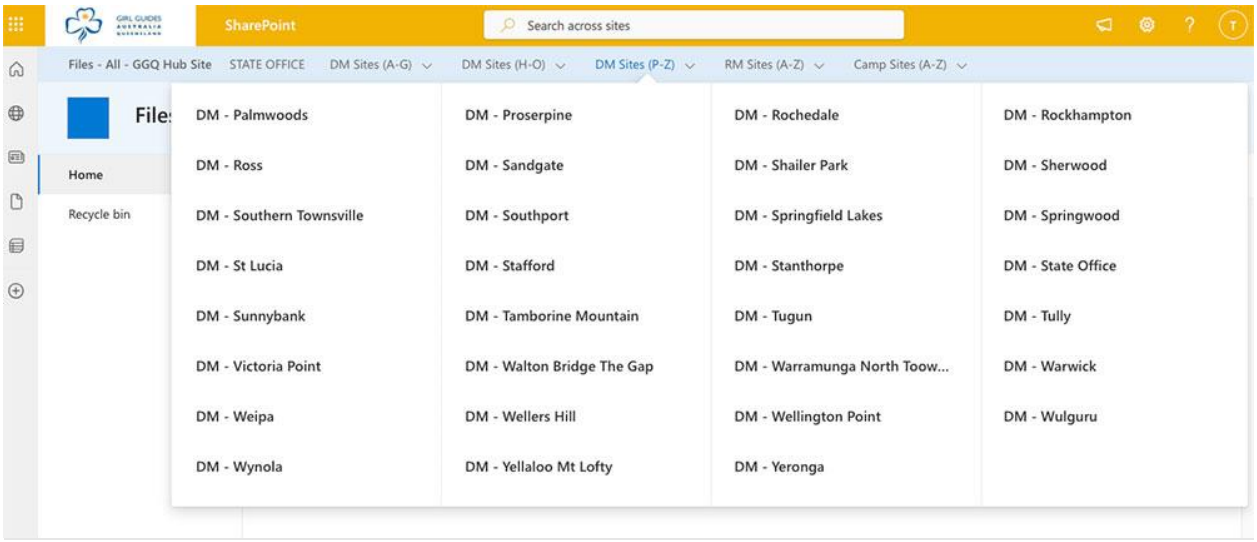

When you open the SharePoint start page, you will see a 'Featured Links' section on the left of the screen. Access to the Leaders' SharePoint sites is through the GGQ Hub Site. Click on the GGQ Hub Site link and the GGQ Hub Site will open for you.

The "**Files – All – GGQ Hub Site"** is the hub site that provides links to all the individual GGQ Region, District and Campsite SharePoint sites.

You will see an alphabetised drop-down list at the top of the page for DM (District Manager) Sites, RM (Region Manager) Sites and Campsites. You will only be able to access the SharePoint sites that are relevant to your role. You will not be able to access any other SharePoint sites.

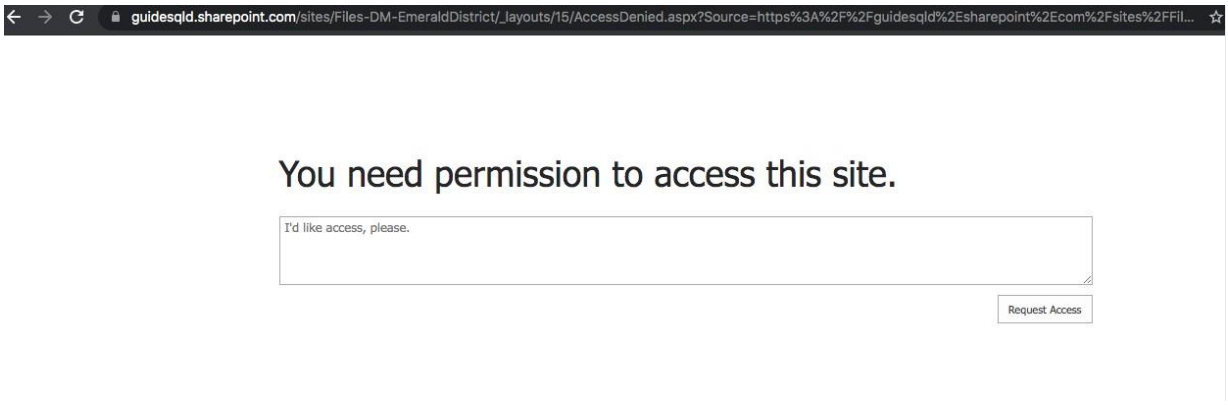



Hover over the option that contains your District/Region/Campsite name and a dropdown list will appear of all the individual sites under that menu option.

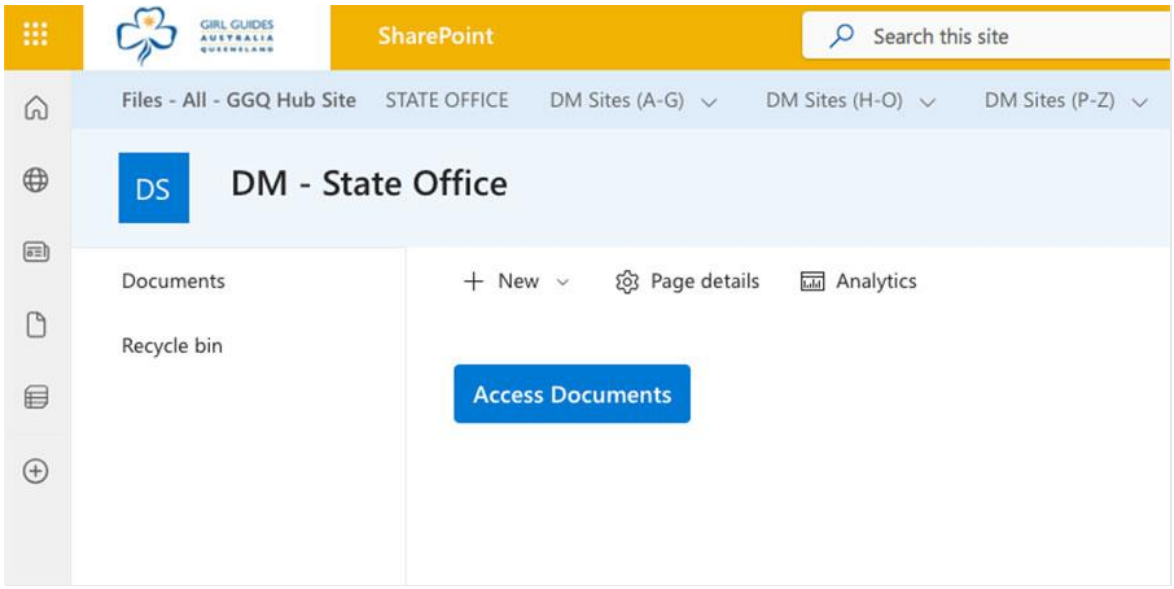



Select the site you want to access.

If you do not have permission to access the chosen site, you will see an error message informing you of this. If you think you should have access to the site, please raise the issue through patrol.

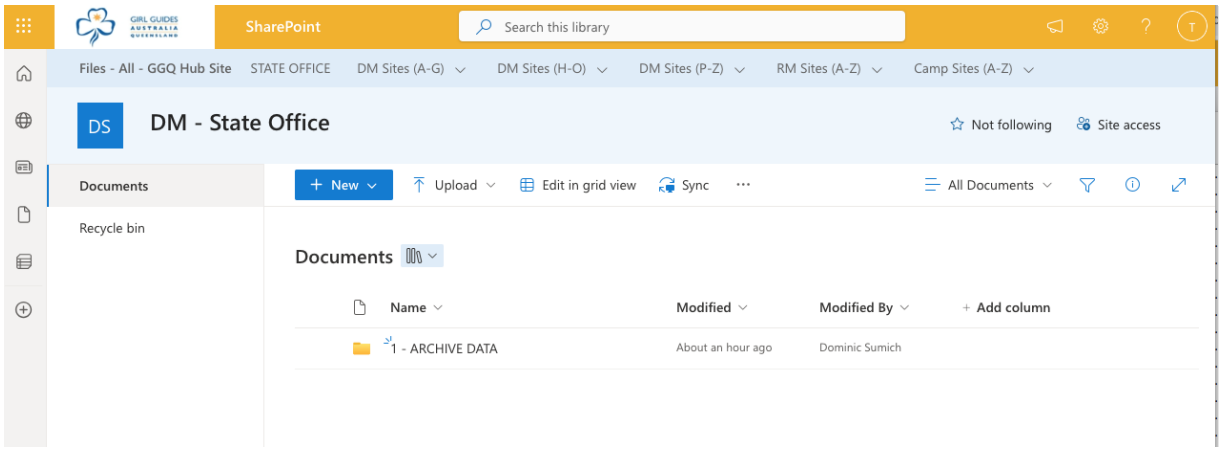



Once you have selected your SharePoint site, you may see a blue button with the text ‘Access Documents,’




click the 'Access Documents' button and you will proceed to your SharePoint site.

Once the SharePoint site opens, you will see the following window.



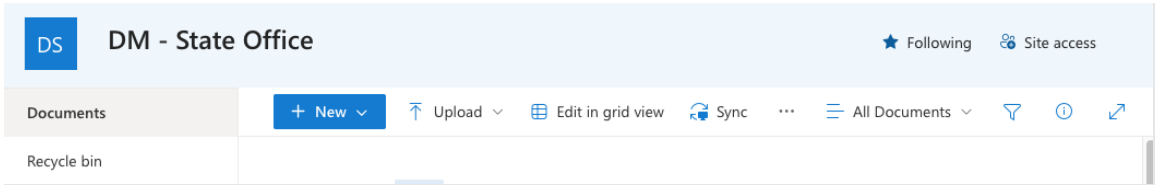

The Documents folder is your home folder where documents will be stored. Inside the Documents folder, there is a single other folder called '1 – ARCHIVE DATA'. This is where you should put any files which are obsolete and no longer in use.

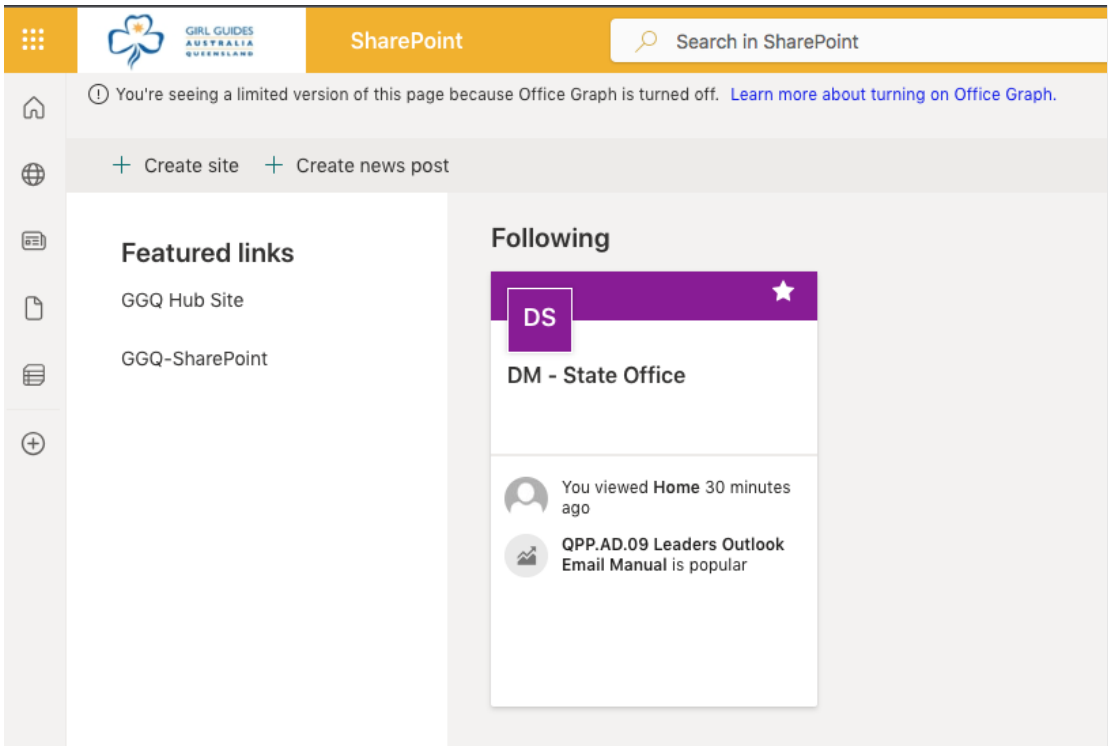
The Recycle bin is where deleted files will go. You could restore them from the Recycle bin if you deleted them accidentally.

The folder structure you should create inside your SharePoint site is described in section 6.1.

When you first access your SharePoint site, click on the blue star in the top right where it says 'Not Following'. This will change to read 'Following' and will create a shortcut on your SharePoint

home page which will let you navigate to your site directly in future without going through the Hub site.

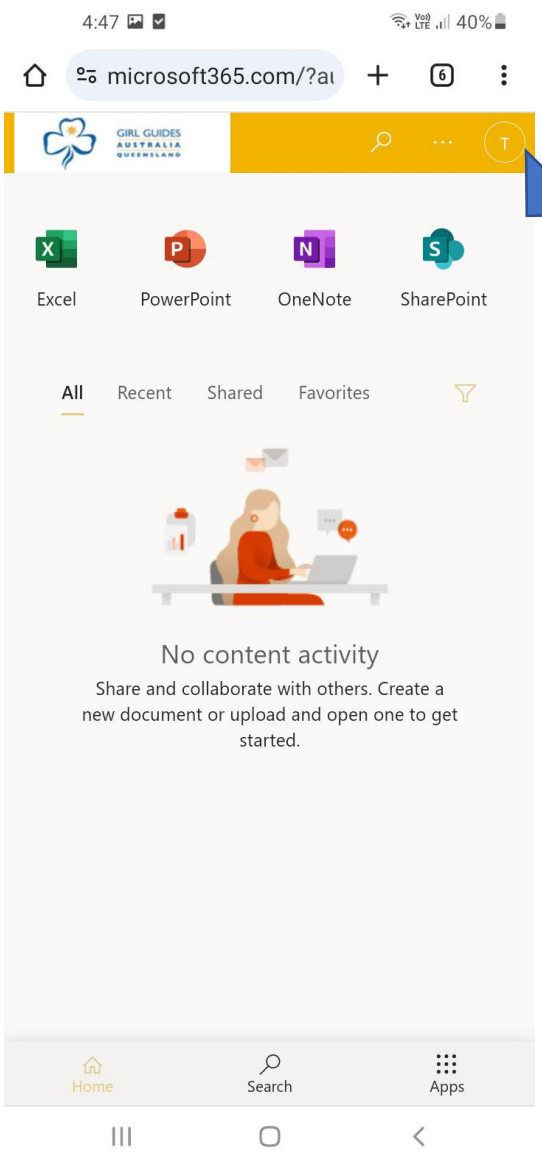


## 5.2 Navigating to SharePoint on a mobile device or tablet

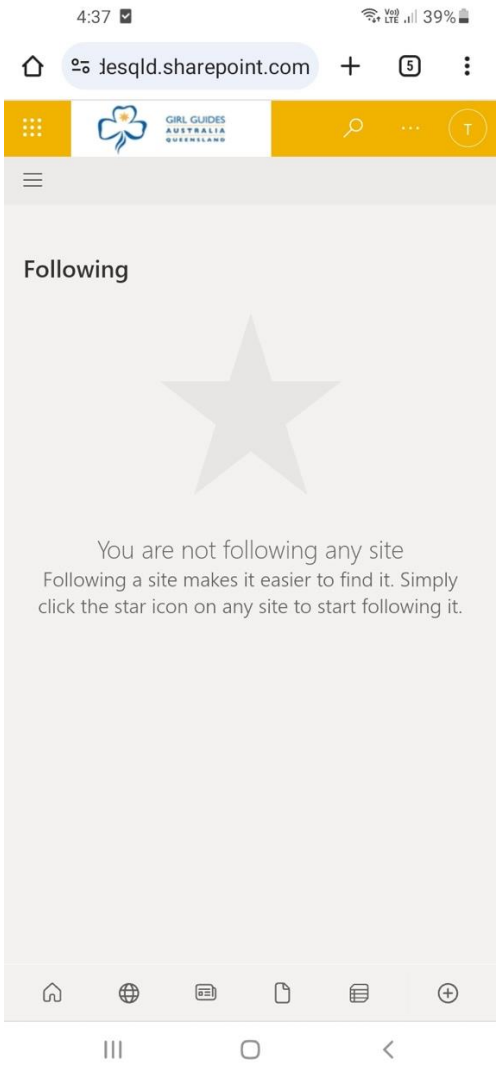
**Note: We do not recommend you use the M365 or SharePoint iOS/Android app on your mobile device or tablet. This is because the app has less functionality than the browser version. We always recommend that you access SharePoint through a browser when using your tablet or mobile device.**

When you log in to M365 through your browser, you will see the M365 start screen, similar to the image below;

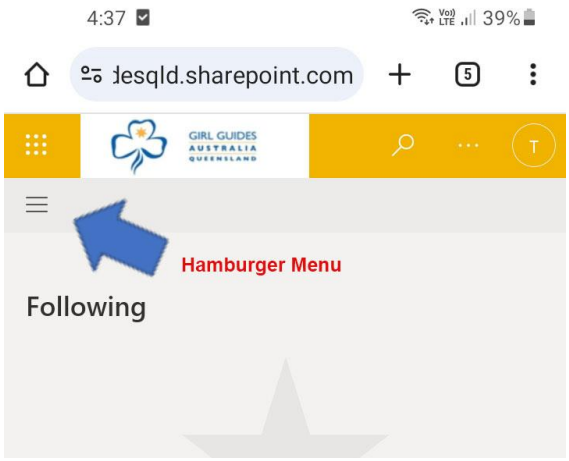



Your different apps appear on this top ribbon. You can swipe left and right to see all the apps available to you.

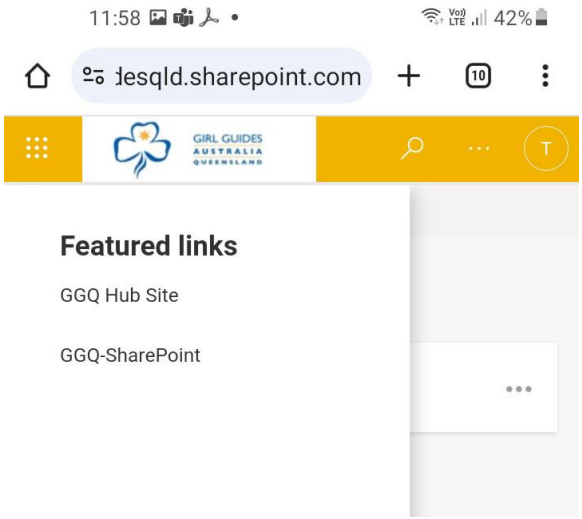
Select the SharePoint icon and it will open to your SharePoint start screen.



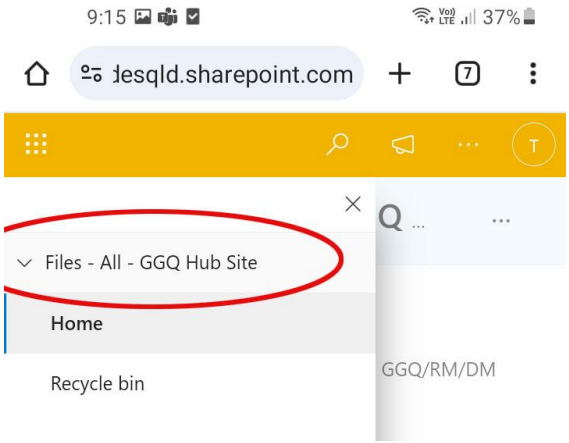

If you are first accessing your site on your mobile device, you will have to use the left hand menu system to navigate to the site. Once you land on your site, we will cover how you can create a shorcut that will help you access it faster in future.



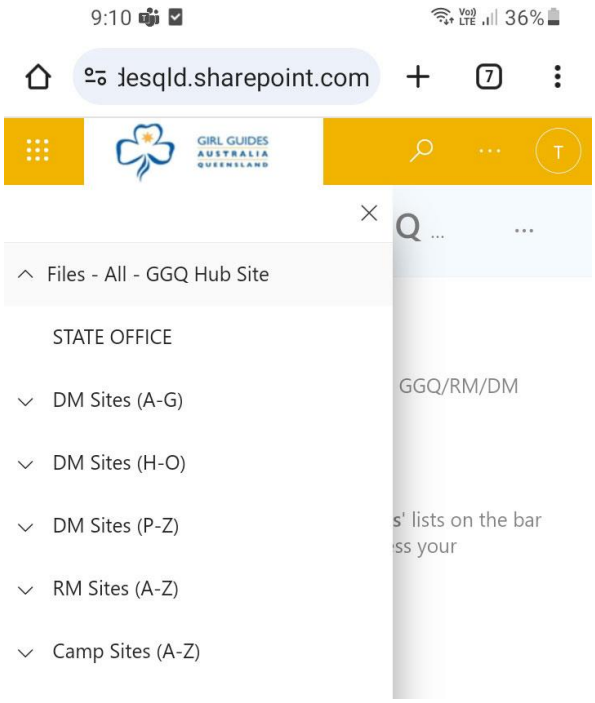

Click on the ‘Hamburger’ menu and select ‘GGQ Hub Site’ from the Featured Links drop-down list.



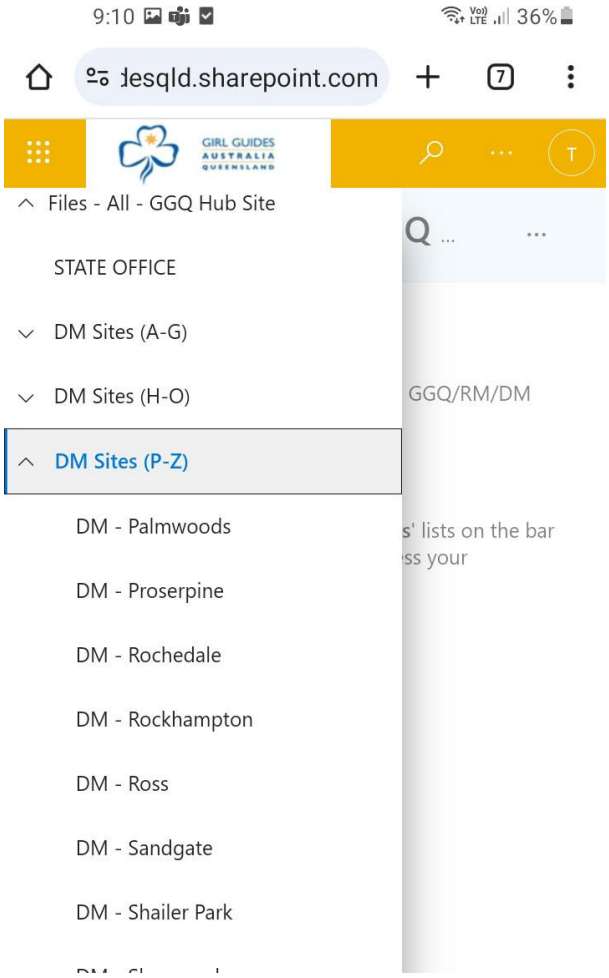

Once in the GGQ Hub Site you can select your own District/Region/Campsite SharePoint site from the drop-down list on the left hand side under the hamburger menu. Select the 'Files – All – GGQ Hub Site option;

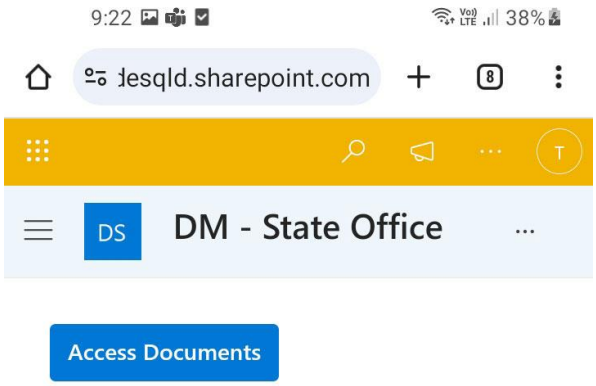



The Leader SharePoint sites are listed in groups alphabetically. Scroll down to the group that contains your site name and select that option.

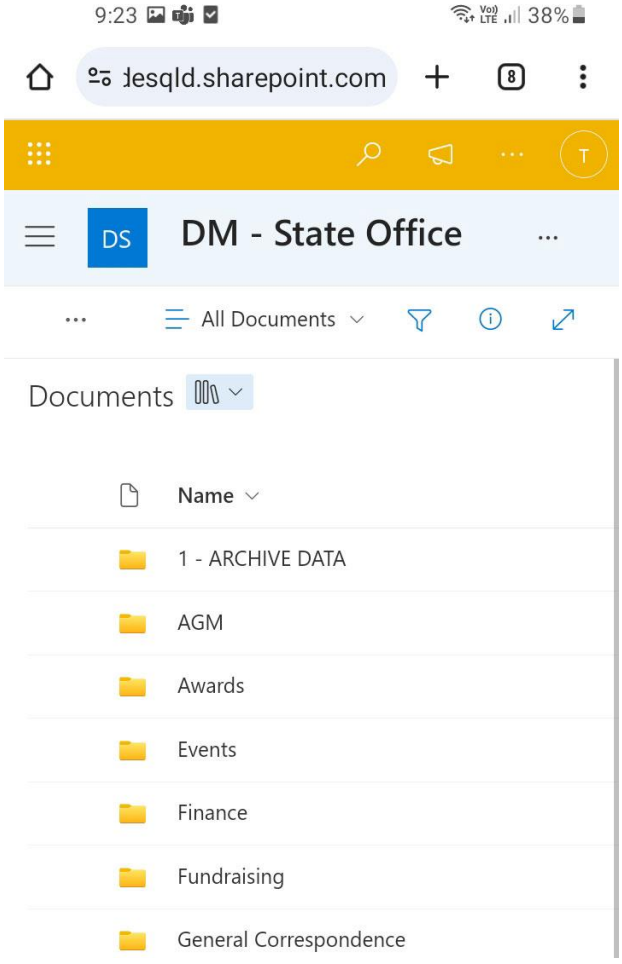



A final list will appear of all the sites in that group and you can select yours.





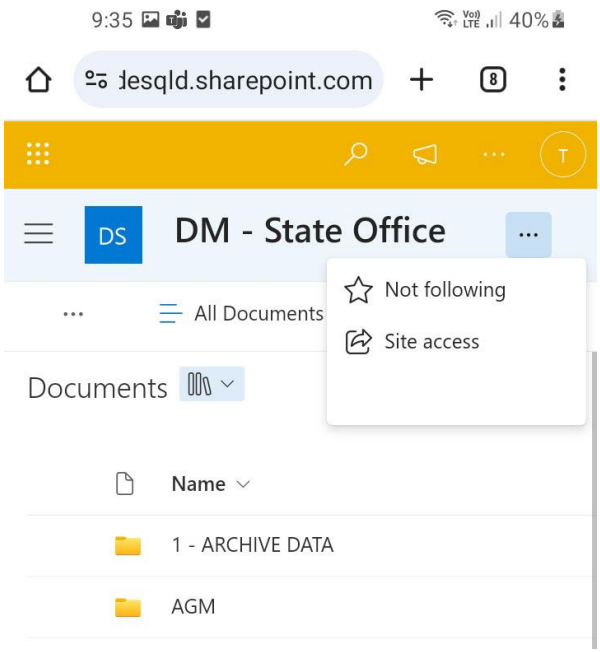

Your SharePoint site will open with a button which reads ‘Access Documents’. Click on the button to proceed to your documents.



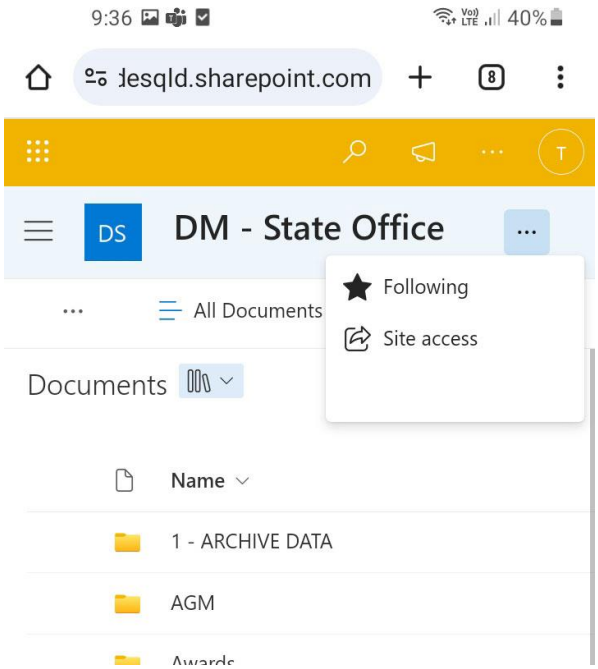

The Documents folder is your home folder where documents will be stored. Inside the Documents folder, there is a single other folder called ‘1 – ARCHIVE DATA’. This is where you should put any files which are obsolete and no longer in use.

The folder structure you should create inside your SharePoint site is described in section 6.1.

When you first access your SharePoint site, you can create a shortcut on your SharePoint home page which will take you directly to your site in future without going through the Hub site navigation. To do this, click on the three-dot menu in the top right of screen. You will see a blank star option with the text ‘Not Following’.

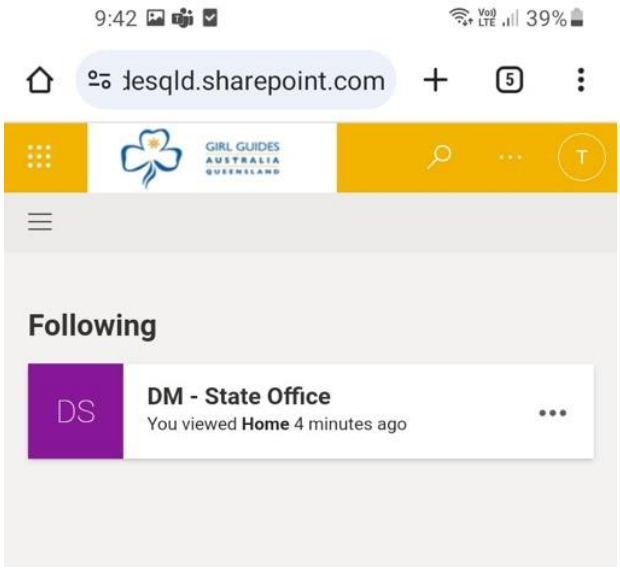



If you click on the blank star, the star will become filled and the text will change to ‘Following’. When you follow a site, the system creates a shortcut on your SharePoint home page that will take you directly to your site in future.



**Note: You will only see the new shortcut when you next login via a new browser.**

When you next log in to your SharePoint start page, you will see the Followed site shortcut. You can select that site and proceed straight to your documents.




### 5.2.1 Microsoft mobile apps for editing files

If you are working on SharePoint on your tablet or mobile, we do recommend that you download the Word, Excel and PowerPoint apps to your device as they will be required if you need to create and edit documents in SharePoint.

## 6.0 Organising Folders and Files

We have 2 methods for organizing your documents;

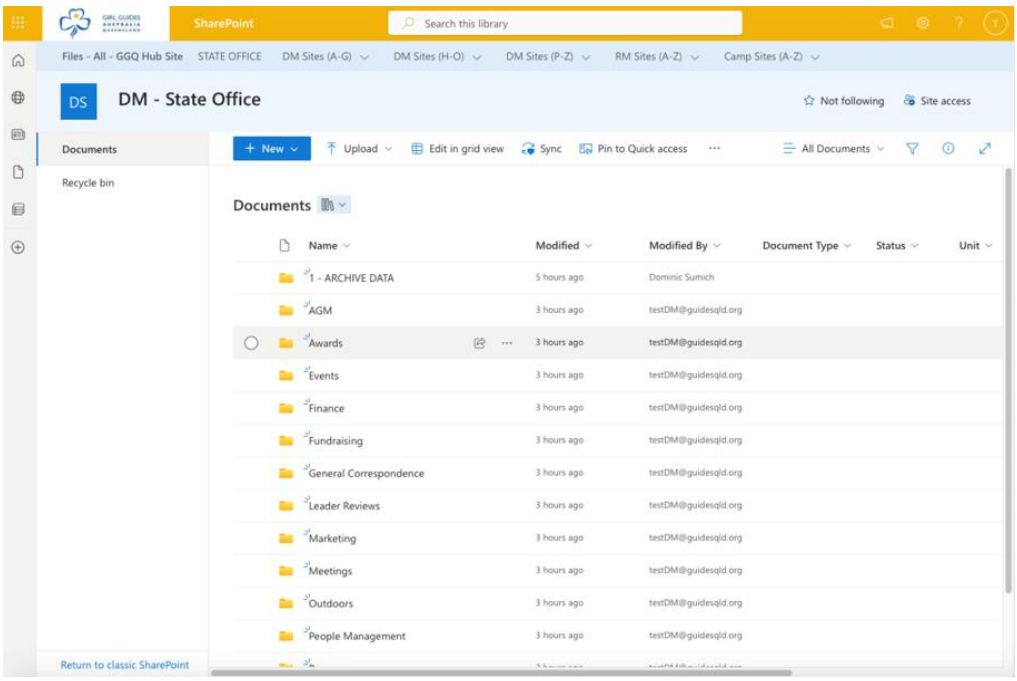
1. Folders and Files
2. Document Tagging

You can choose either method or a combination of both.

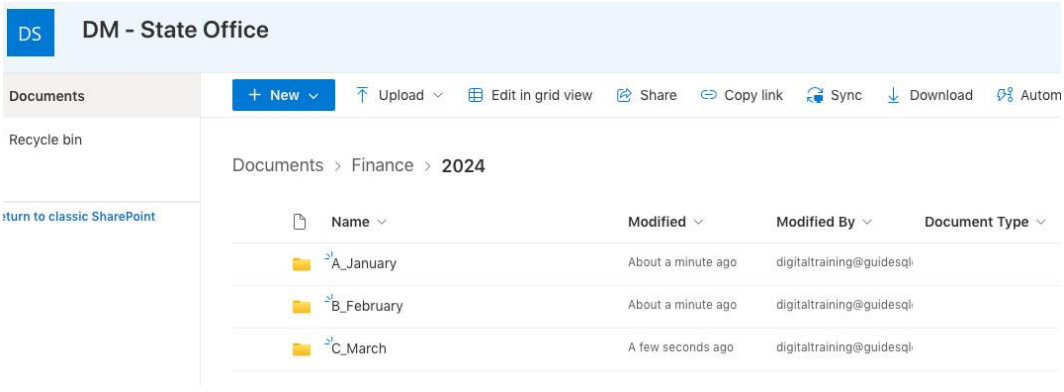
### 6.1 Using Folders to organise documents

Please create the following main folders in your SharePoint site under the Documents folder:

| | |
|---|---|
| AGM | Marketing |
| Awards | Meetings |
| Events | Outdoors |
| Finance | People Management |
| Fundraising | Program |
| General correspondence | Property |
| Leader reviews | Support group |




Within each of these main folders, we recommend you create a new folder for each year of documents – 2024, 2023 etc. If necessary, you can also create a folder for each month within each of the year folders. This may be useful within the Finance folders, for example, allowing you to separate the finance documents for each year/month.




In this example, we prefixed the month folders with the letters A, B, C etc. so that they will be listed in calendar order in the year folder. You don't need to do this but it's a handy tip if you would like them to appear in calendar order on screen.

### 6.1.1 Using Tagging to organise documents

Document tagging involves adding metadata to your documents after upload so that you can filter by documents of the same type on screen.
Tagging is a powerful way of categorising documents making it simpler for you to find relevant files.

Tagging is done after document upload and is described in more detail in section 6.8

## 6.2 Files we need to upload to SharePoint

When you first access your SharePoint site, you are required to upload all relevant documents as specified by the below table. Please note the retention period that applies to each document type.

| **Document Type** | **Period of time** |
|---|---|
| Minutes (meetings, AGMs, reports etc.) | 99 years |
| Correspondence | 2 years (unless contentious then indefinitely) - err on side of caution and retain until clarified by State Office staff |
| Financial records | 5 years |
| Receipts for recurring expenses | 7 years |
| Receipts for capital expenses | 99 years |
| Incident/Accident forms | 99 years |
| District logbooks | 99 years |

Other documents you may have and should store online (no defined limit for keeping these documents):

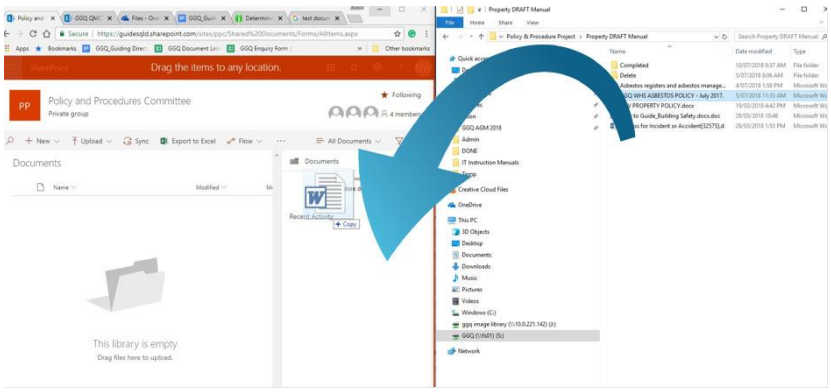
- Key holders for property
- Learning partners
- Unit meeting details (time/days etc.)
- List of district bank accounts, branch, account numbers, signatories, and use of an account
- Support Group details
- Property leases agreements, sub-letting agreements, LTOs
- Units/districts in recess or closed
- Award nominations
- District or Region camps/event details
- All Membership forms including: - ADM health forms (prior to online version), Leave of Absence, Membership Support Fund applications, Support Group application, Ongoing Volunteer application, Adult Member application, Youth Membership application (prior to online version), Fair Play vouchers (if received)

**Please start uploading documents for the current year and once complete, continue to upload documents for previous years starting from the most recent.**

## 6.3 Copying files to SharePoint – Drag and Drop

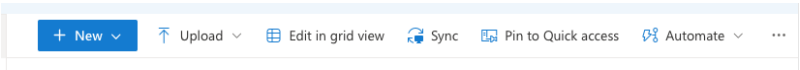
There are several ways to copy files to SharePoint. The easiest way is to drag and drop.

1. Navigate around your computer to the files you want to move into SharePoint
2. Open your SharePoint site in a browser window and navigate to the folder you want to upload to
3. Highlight and drag your files into SharePoint by clicking the left mouse and drag them into the SharePoint window
4. Wait for the file(s) to upload




## 6.4 Copying files to SharePoint – 'Upload' button

You can also use the 'Upload' button on the SharePoint web site

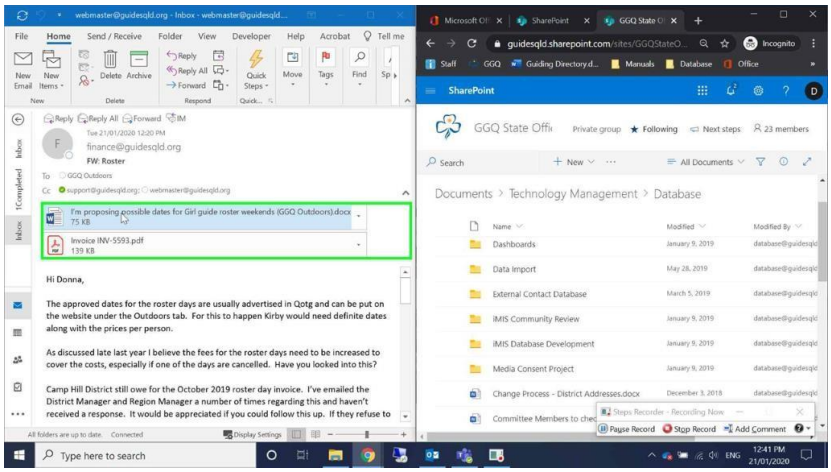



Click on the 'Upload' button in the top SharePoint menu, select 'Files' and navigate to the files you want to upload. Select the files for upload and click 'Open.' Your files will then be uploaded to your SharePoint site.

## 6.5 Copying files to SharePoint – Upload from an Email

**Note: This option only works with Outlook Desktop version, not Outlook for web.**

1. Open the email with attachments in one window and your SharePoint site in another.
2. Click the attachment you wish to move and hold the LHS mouse button down



3. Drag your mouse (whilst holding the button down) over to the SharePoint window
4. Release the mouse when the blue dotted line is on the folder you wish to save it on.

## 6.6 Transferring files from OneDrive to SharePoint

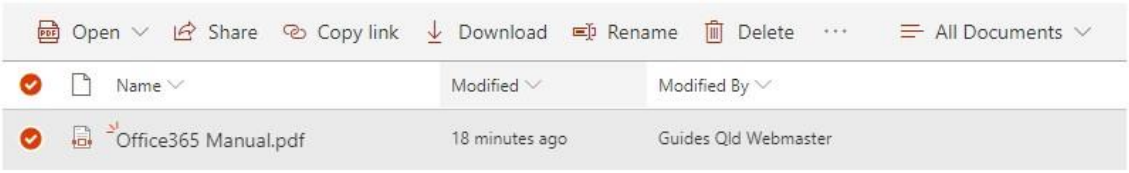
OneDrive should **not** be used to store any GGQ documents.

If you have accidentally stored documents on OneDrive, please contact webmaster@guidesqld.org to guide you through moving them to SharePoint.

## 6.7 Opening files on SharePoint

Click on the file name or right click and select 'Open.'

This will open the document




*NOTE: If opening a file on SharePoint Online it will open in the online version of the relevant app - Word, Excel, PowerPoint etc. The online version works the same but looks a little different. Some features of the desktop apps are not supported in the online version.*

If you have edit permissions on a document that you have opened from SharePoint, your changes will automatically be saved as you make them.

## 6.8 Document tagging

Tagging your documents enables you to filter, search or navigate through your documents quickly. It does this through the use of metadata. As such, we need to add metadata to the files that will help to filter them in your SharePoint view. For example, you can update your SharePoint view to see only Meetings files, Outdoors or Finance files or a combination of multiple types.

Tagging your documents can be done in bulk, most suitable if you are uploading multiple documents – this is done in grid view. Or independently, one document at a time.

Only approved tags should be used when tagging documents. Please see below the approved tags to use for your documents by role;

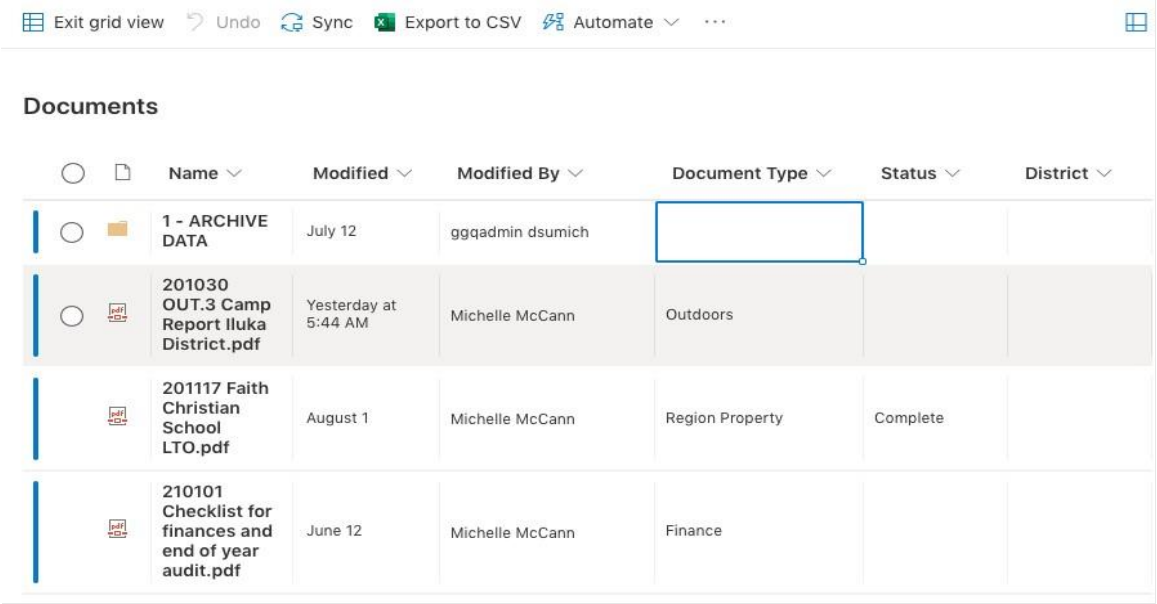
| | Region Manager | District manager | Campsite |
|---|---|---|---|
| **Tags** | DM Reviews<br>Finance<br>General Correspondence<br>Issues<br>Meetings<br>Outdoors<br>Partnerships/Sponsorships<br>People Management<br>Region Events<br>Region Property<br>Region Team<br>Reports<br>Resources<br>Templates<br>Trefoil | AGM<br>Awards<br>Correspondence<br>District minutes<br>Events<br>Finance<br>Fundraising<br>General<br>Leader reviews<br>Maintenance<br>management<br>Marketing<br>Membership<br>Outdoors<br>People<br>Property<br>Resources<br>Support group minutes<br>Template | AGM<br>Bookings<br>Finance<br>General Correspondence<br>Maintenance<br>Meetings<br>Outdoors<br>People Management<br>Property<br>Risk<br>Template |

## 6.9 Editing files in grid view

Editing files in grid view is an efficient way of updating file names and multiple metadata/tags in a single view.

Select 'Edit in grid view' from the SharePoint menu.

The page display will change to a view that allows you to edit any of the fields for each file.




You can then click into each of the data field boxes and set values for properties such as the Document Type, Status, District etc. In the document Type and Status fields, you will see a drop-down list to select the value from, in the district field, you must type in the name of the district the file relates to.

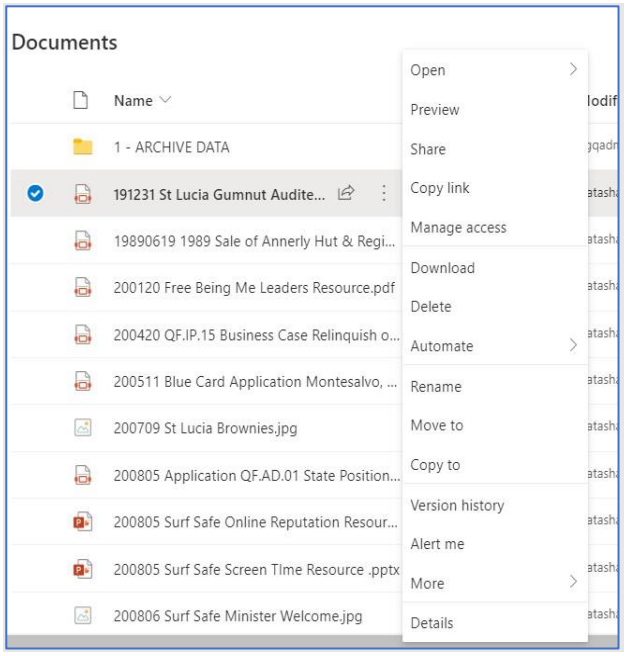
If you find that your document does not fit into one of these categories – please contact webmaster@guidesqld.org - tags are consistent across all sites and centrally managed, but we can add more if you find something missing.

Once you have made all your updates, click 'Exit grid view' to go back to the regular file list view.

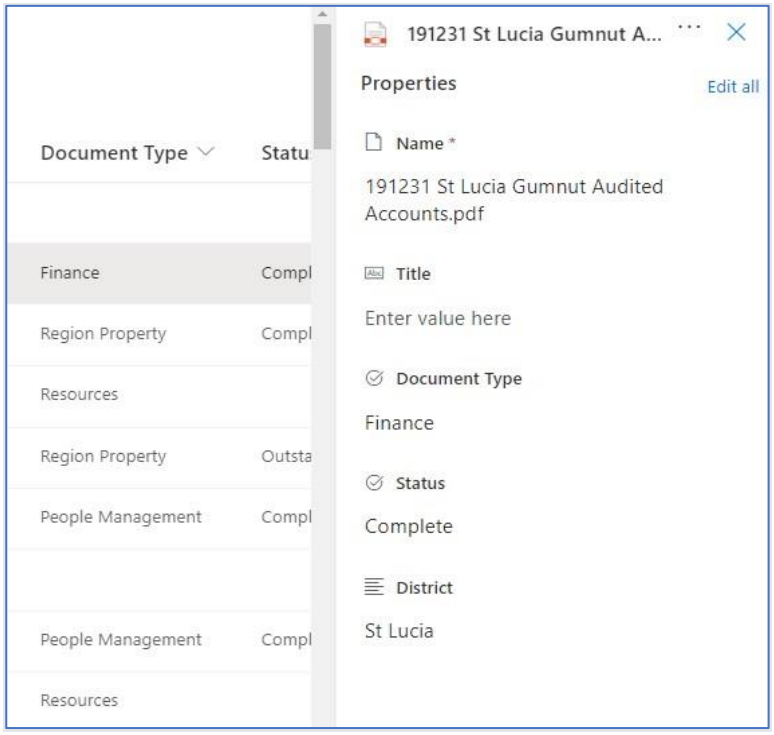
With region-based documents, you can either type Region or leave the field blank – either way you will be able to easily search for those tagged within this convention.

## 6.10 Editing single files

Once you are up and running and only having a single file to upload and tag, you can simply click on the **three dots** to the right of the filename and click **details**.



On clicking details, a panel will open on the right-hand side of your window where you can scroll down to edit your tags, file name or information.



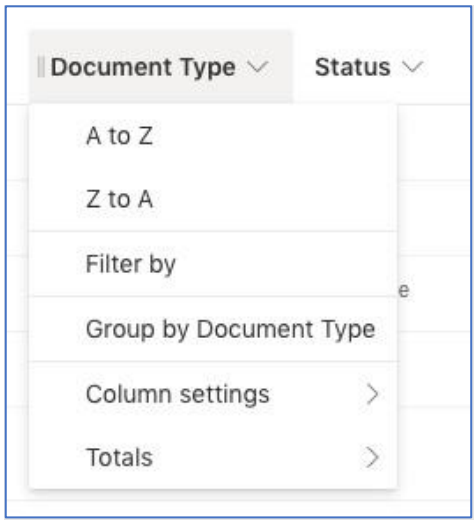

## 6.11 Filtering documents

Once you have added your document types, statuses etc you can filter your SharePoint view so that you see;

- documents in date order (sort Z to A to bring the most recent to the top)

- only certain documents (Filter By)

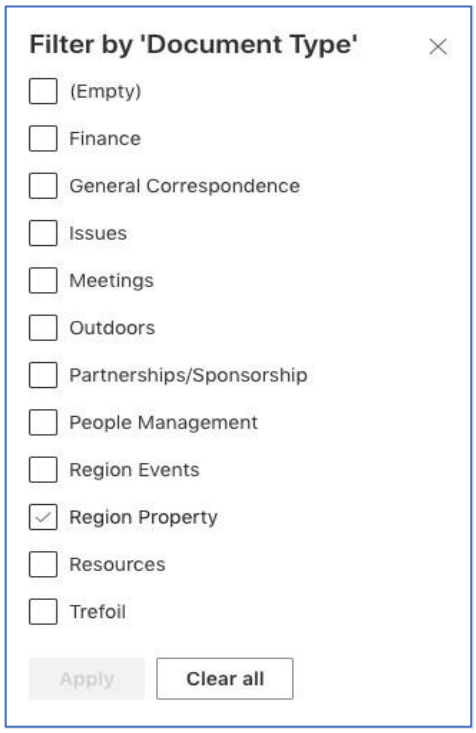
- or you can group them, so all your Outdoors are together for example.



To do so click on the column you want to set filters on.

And select ‘Filter By.’ Another popup will appear allowing you to select which of your metadata values you want to see.

You can select any individual value or multiple values. Click ‘Apply’ and your view will only show documents that have that value applied. This is a powerful way to organise your files.




## 6.12 Giving other users access to your files in SharePoint

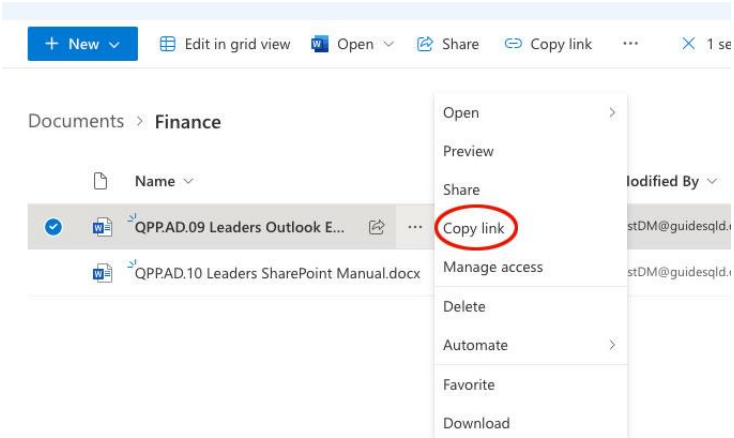
You may allow other people to view or edit your SharePoint files. This must only be done in complete accordance with your role and as per your GGQ Confidentiality and Non-Disclosure Agreement.

Allowing access to your file is done in two ways;

1. Allow other GGQ users to view or edit your files
2. Allow external parties to view or edit your files

## 6.13 Allow other GGQ users to view or edit your files in SharePoint

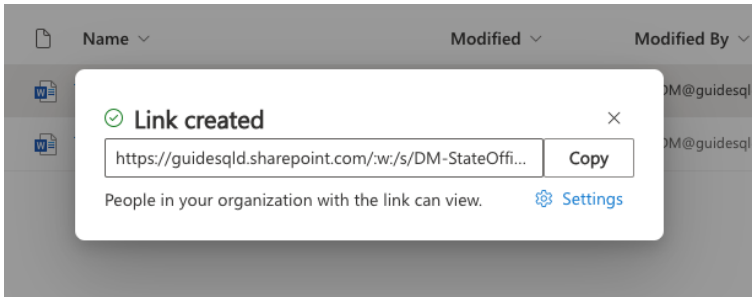
To allow GGQ users within the @guidesqld.org environment to view or edit your files click on the 3 dots to the right of the filename and select the ‘Copy Link’ option. Do not use the **Share** option.




A popup window will contain a link to the file.

### 6.13.1 Allow GGQ users to view your file

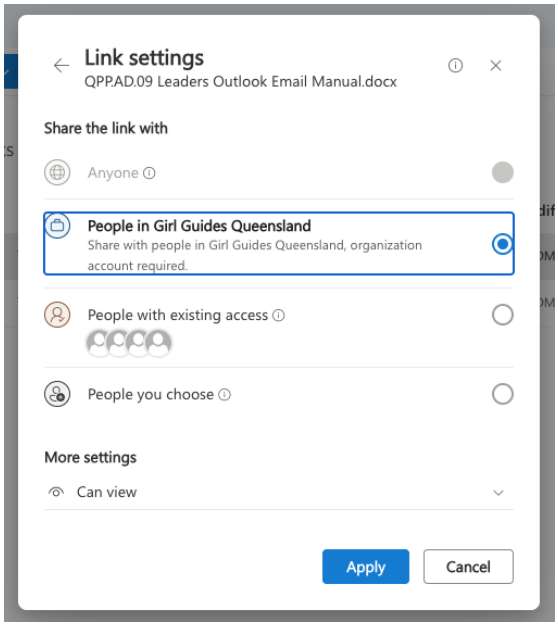
The default link will allow other GGQ users to view the file. Simply click on 'Copy' and the link will be copied to your clipboard. You can then paste this link into an email to any other GGQ user(s).



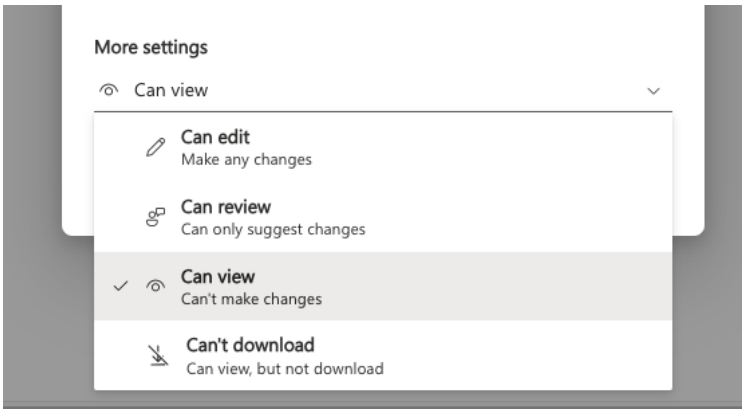

When the recipient clicks on the link in the email, they will be able to view the file.

### 6.13.2 Allow other GGQ users to edit your file

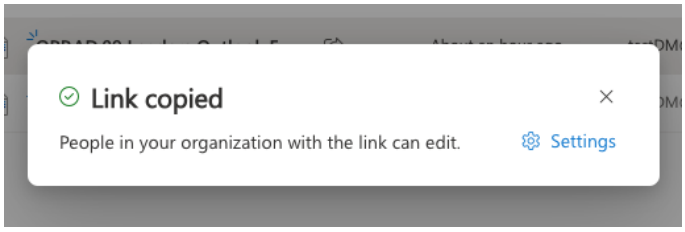
If you click on the settings link in the bottom right corner of the popup, you will see an expanded set of options for your link;




At the bottom of the window where it says 'More Settings' you can see the default is that other people 'Can View' the document via the link. If you click on the down arrow to the right, you will be able to choose from other options to allow a recipient to edit (or review/view but not download) the document.




If you want the recipient to be able to edit the document, select the 'Can Edit' option and click apply. The link to the document will be copied to your clipboard and you can paste in into an email to the other GGQ user(s).

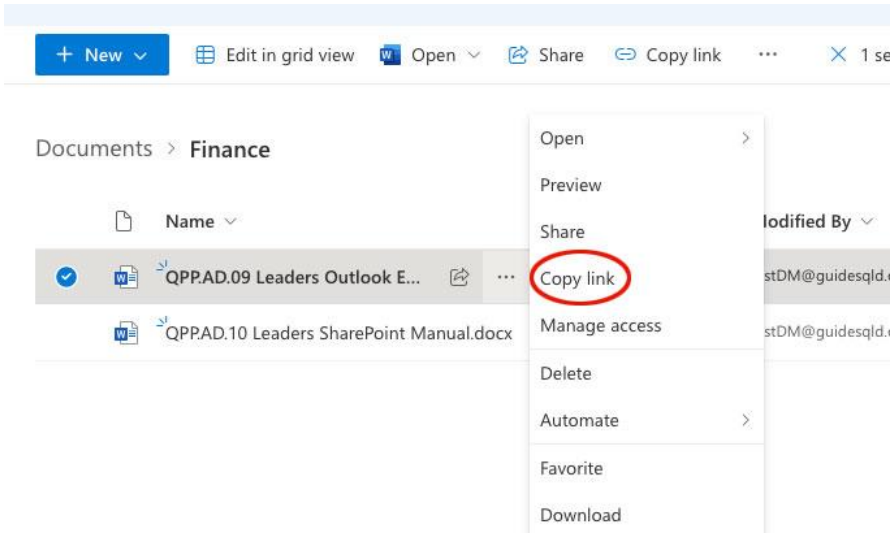



## 6.14 Allow external parties to access files in SharePoint

### 6.14.1 Allow external users to view your file

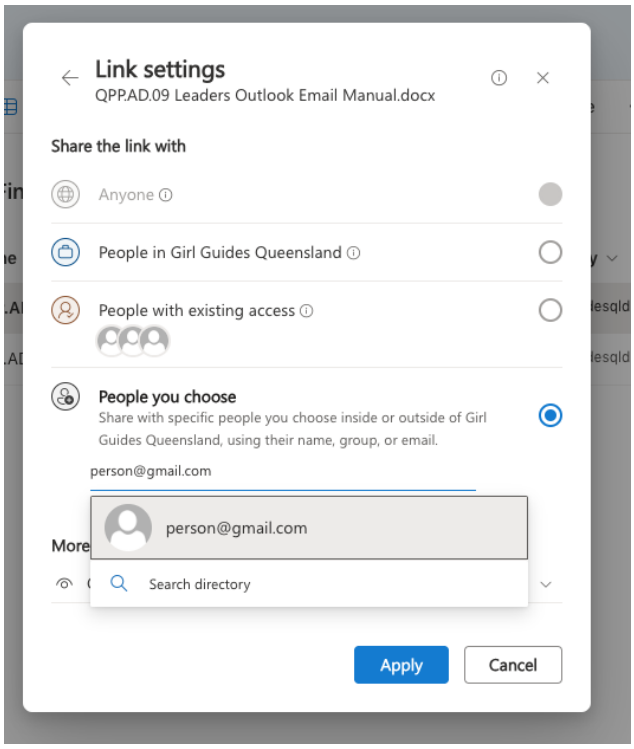
**Please use this option with care and only share information with authorised people as per your role and Confidentiality and Non-Disclosure Agreement.**

Click on the 3 dots to the right of the filename and select the 'Copy Link' option. Don't use the **Share** option.

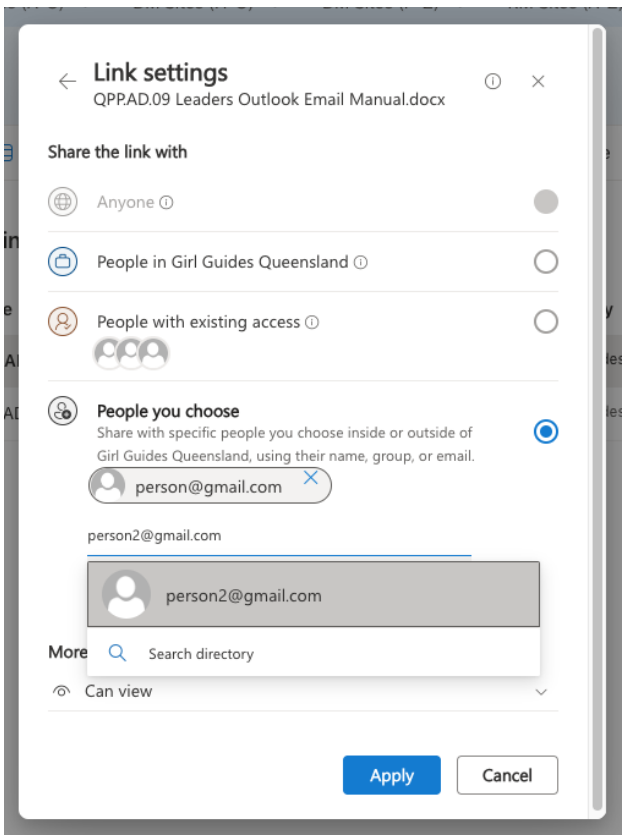



Click on the settings link at the bottom right of the popup to expand the link options window.

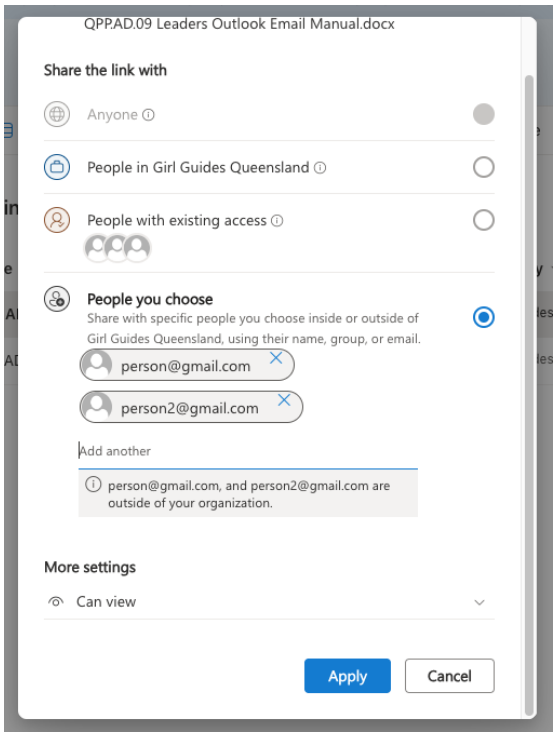
Select the ‘People you choose’ option and enter the email address of the person you are sending the link to.



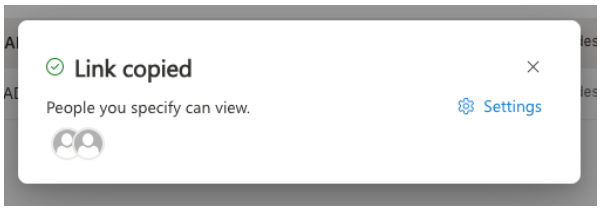

Click on the grey box containing the email address to add it to the recipient list. If you need to add another email address, enter the new address and click on the grey highlighted box to add it to the list.



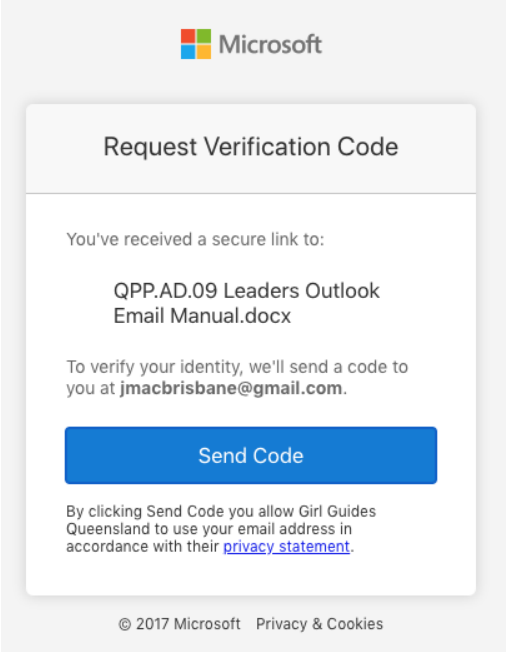

Once you have added all required recipients click ‘Apply’ to create the link



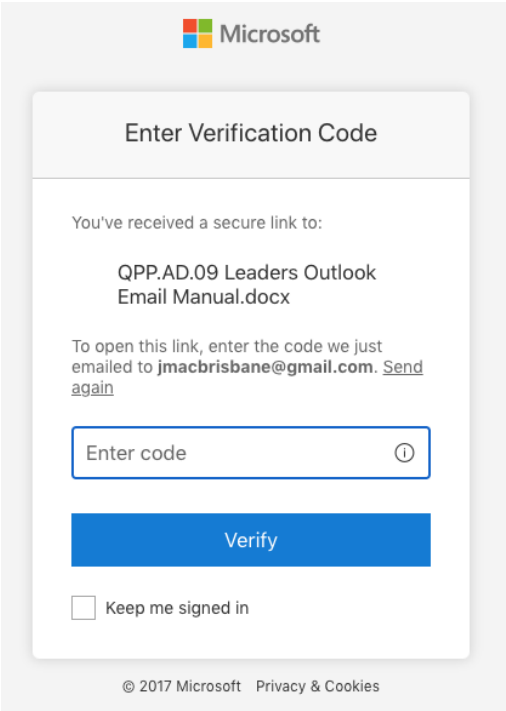

The link will then be copied to your clipboard and you can then paste it into the email you send from your shared mailbox to the list of recipients.




When the external user clicks on the link to view the file, they will see window which confirms they have received a secure link and to request an verification code.




When the recipient clicks on 'Send Code', a code will be sent to their email account. They will then be asked to enter the code that was just sent to their email address.

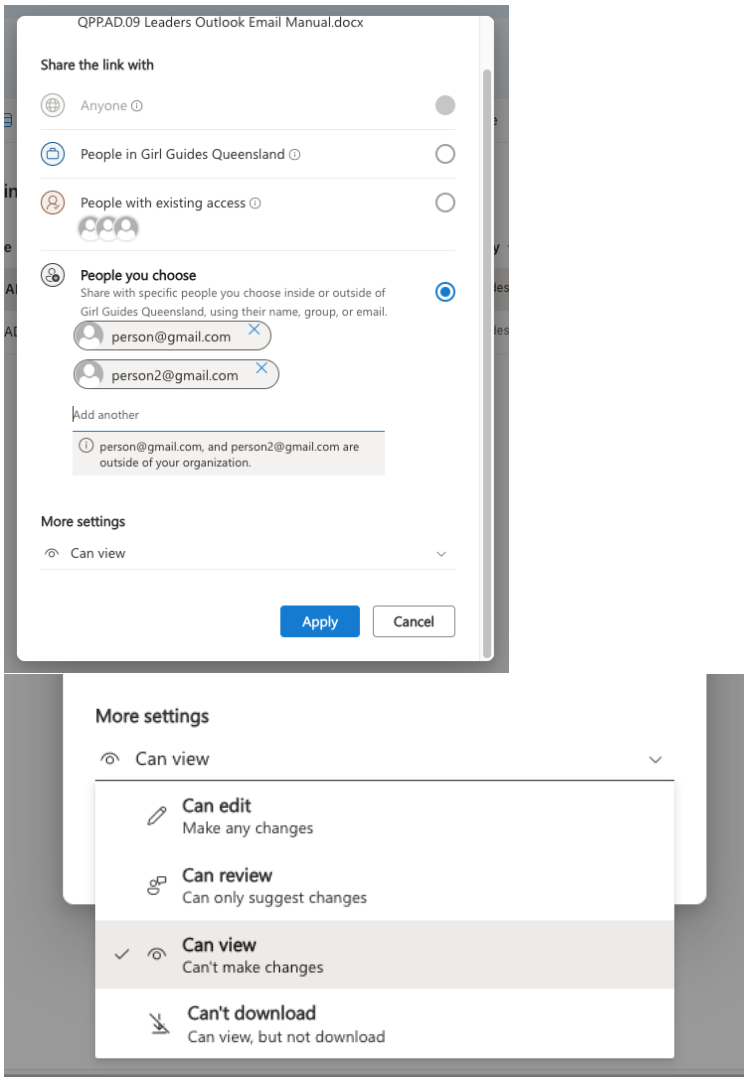



When they enter the code they were sent and click 'Verify', they will be directed to the file.

### 6.14.2 Allow external users to edit your file

**Please be extremely careful when using this option and only share information with authorised parties as per your role and your Confidentiality and Non-Disclosure Agreement.**

When you add your recipients to create your link, under 'More Settings' you can change the access from 'Can View' to 'Can Edit'




This will allow your external recipients to edit the linked file.

## 7.0 Technical support

Please contact Digital Officer at GGQ State Office for SharePoint Technical Support.

webmaster@guidesqld.org