

Guides Queensland SharePoint Manual

For Region, District and Campsite Managers

Contents

Aim and Scope of this Guide
1.0 What is SharePoint?
2.0 Why we must use SharePoint instead of personal computers
2.1 Security
2.2 Privacy
2.3 Continuity
3.0 Microsoft 365 – The Parent System
3.1 Understanding the relationship between Microsoft 365 and SharePoint
4.0 Signing in to Microsoft 365
4.1 Signing in to Microsoft 365 in a web browser3
4.2 Microsoft 365 two step verification5
5.0 Opening SharePoint
5.1 Navigating to SharePoint on a desktop browser6
5.2 Navigating to SharePoint on a mobile device or tablet12
6.0 Organising Folders and Files
6.1 Using Folders to organise documents
6.2 Files we need to upload to SharePoint20
6.3 Copying files to SharePoint – Drag and Drop21
6.4 Copying files to SharePoint – 'Upload' button21
6.5 Copying files to SharePoint – Upload from an Email21
6.6 Transferring files from OneDrive to SharePoint22
6.7 Opening files on SharePoint
6.8 Document tagging22
6.9 Editing files in grid view23
6.10 Editing single files24
6.11 Filtering documents25
6.12 Giving other users access to your files in SharePoint26

	6.13 Allow other GGQ users to view or edit your files in SharePoint.	
28	6.14 Allow external parties to access files in SharePoint	
	7.0 Technical support	

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.

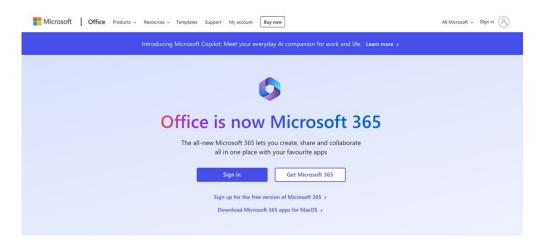
1. Open your preferred web browser (Chrome, Edge, Safari etc)



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

•••	💿 New Tab	×	+
$\leftarrow \ \rightarrow$	C office.com		

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.

Microsoft		
Sign in		
Email address, pho	ne number or Sk	уре
No account? Create o	ne!	
Can't access your acc	count?	
	Back	Next
	Back	Next
	Back	Next
्र Sign-in optio		Next

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 <u>Microsoft Authenticator guide</u> 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.

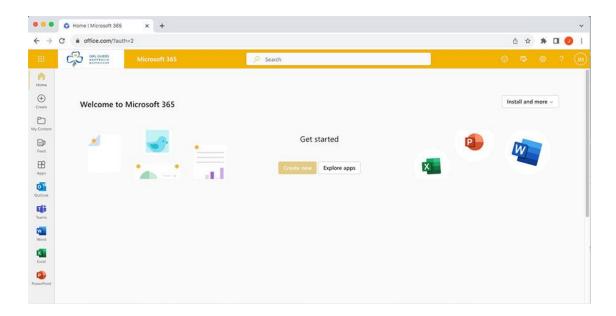
FAQ: What happens with the Modern Authentication If I get a new mobile phone?

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

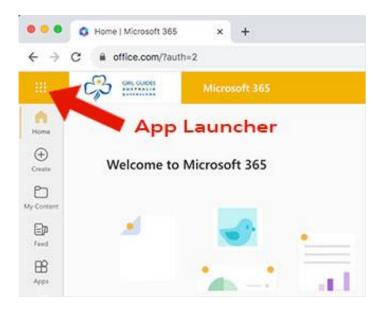
5.1 Navigating to SharePoint on a desktop browser



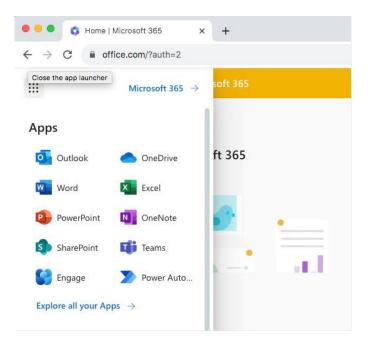
When you first sign in to Microsoft 365, you will see a window similar to the above. On the lefthand side of the window, you will see shortcut icons to some of your different Microsoft apps. In this manual we will focus on SharePoint – the Document Library. If you don't see a SharePoint icon on the left-hand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



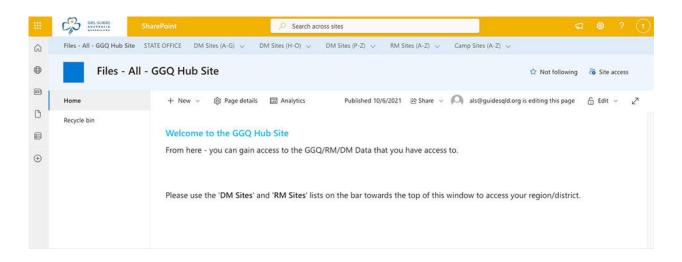
When you click on the SharePoint icon, SharePoint will open in a new tab;

		SharePoint	Search in SharePoint	?	(7)
â	+ Create site + Cre	eate news post			
	Featured links	Following			
	GGQ Hub Site				
C	GGQ-SharePoint				
\oplus					
		Following	You are not following any site g a site makes it easier to find it. Simply click the star icon on any site to start following	t.	

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.

Files - All - GGQ Hu	ab Site STATE OFFICE DM Sites (A-G)	✓ DM Sites (H-O) ✓ DM Sites (P-Z) ✓	RM Sites (A-Z) \lor Camp Sites (A-Z) \lor	
File:	DM - Palmwoods	DM - Proserpine	DM - Rochedale	DM - Rockhampton
Home	DM - Ross	DM - Sandgate	DM - Shailer Park	DM - Sherwood
Recycle bin	DM - Southern Townsville	DM - Southport	DM - Springfield Lakes	DM - Springwood
	DM - St Lucia	DM - Stafford	DM - Stanthorpe	DM - State Office
	DM - Sunnybank	DM - Tamborine Mountain	DM - Tugun	DM - Tully
	DM - Victoria Point	DM - Walton Bridge The Gap	DM - Warramunga North Toow	DM - Warwick
	DM - Weipa	DM - Wellers Hill	DM - Wellington Point	DM - Wulguru
	DM - Wynola	DM - Yellaloo Mt Lofty	DM - Yeronga	

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.

÷ -	> (c	•	guidesqld.sharepoint.com/sites/Files-DM-EmeraldDistrict/_layouts/15/AccessDenied.aspx?Source=https%3A%2F%2Fguidesqld%2Esharepoint%2Ecom%2Fsites%2FFil	☆
				You need permission to access this site.	
				I'd like access, please.	
				Request Access	

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

-		harePoint	ρ Search this site
ଜ	Files - All - GGQ Hub Site S	TATE OFFICE DM Sites (A-G) 🗸 D	M Sites (H-O) \lor DM Sites (P-Z) \lor
⊕	DS DM - State	Office	
() ()	Documents	十 New ~ 63 Page details	🖬 Analytics
٥	Recycle bin		
₽		Access Documents	
\oplus			

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

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

	GIRL GUIDES	arePoint	𝒫 Search this library			ସ	۵	? (T)
â	Files - All - GGQ Hub Site ST	TATE OFFICE DM Sites (A-C	G) \lor DM Sites (H-O) \lor	DM Sites (P-Z) 🗸 🛛 R	M Sites (A-Z) 🗸 C	amp Sites (A-Z) 🗸 🗸		
•	DS DM - State	Office				☆ Not following	省 Site ac	cess
	Documents	+ New ~ ↑	Upload 🗸 🜐 Edit in grid vie	ew ಢ Sync \cdots		All Documents 🗸	7 () 🖉
C	Recycle bin							
		Documents 💵 🗸						
\oplus		🕒 Name	~	Modified $ \sim $	Modified By $ \smallsetminus $	+ Add column		
			HIVE DATA	About an hour ago	Dominic Sumich			

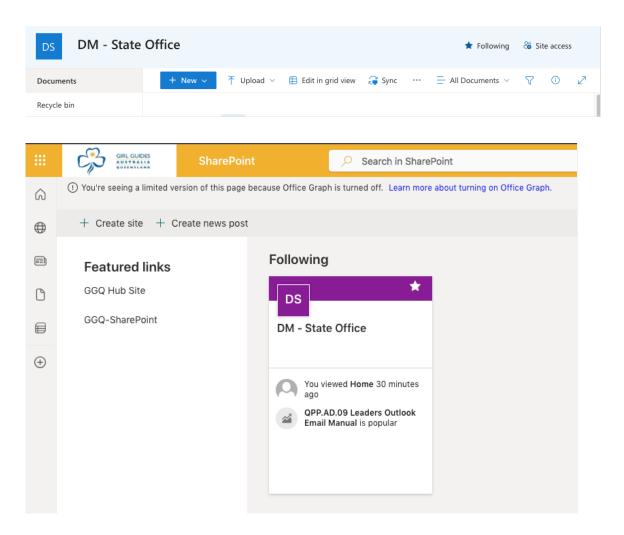
The Documents folder is your home folder where documents will be stored. Inside the Documents folder, there is a single other folder called '1 – ARCHIVE DATA'. This is where you should put any files which are obsolete and no longer in use.

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

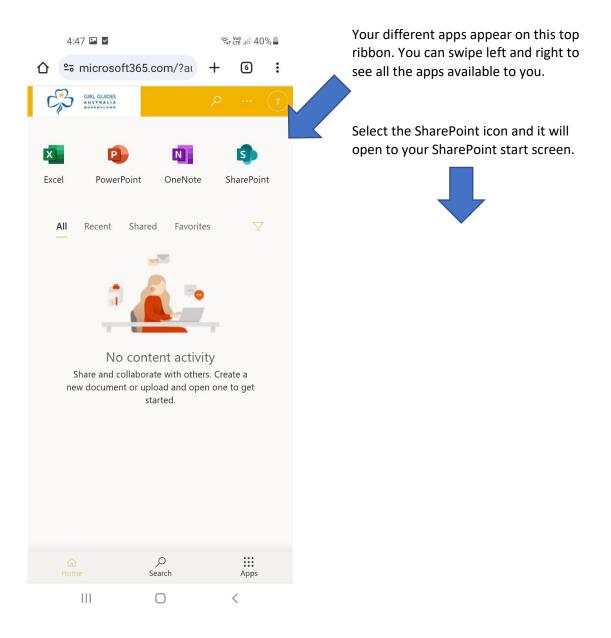
home page which will let you navigate to your site directly in future without going through the Hub site.

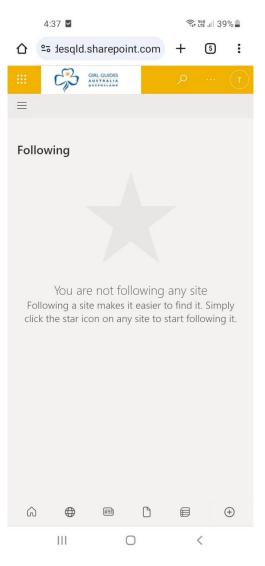


5.2 Navigating to SharePoint on a mobile device or tablet

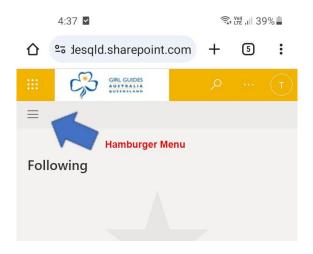
Note: We do not recommend you use the M365 or SharePoint iOS/Android app on your mobile device or tablet. This is because the app has less functionality than the browser version. We always recommend that you access SharePoint through a browser when using your tablet or mobile device.

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

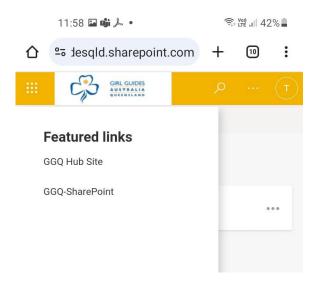




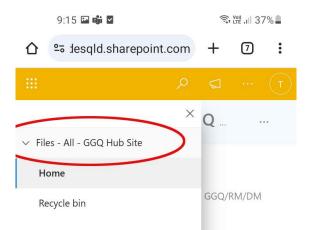
If you are first accessing your site on your mobile device, you will have to use the left hand menu system to navigate to the site. Once you land on your site, we will cover how you can create a shorcut that will help you access it faster in future.



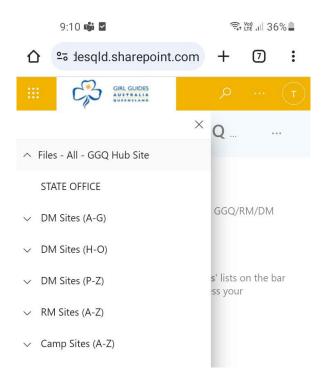
Click on the 'Hamburger' menu and select 'GGQ Hub Site' from the Featured Links drop-down list.



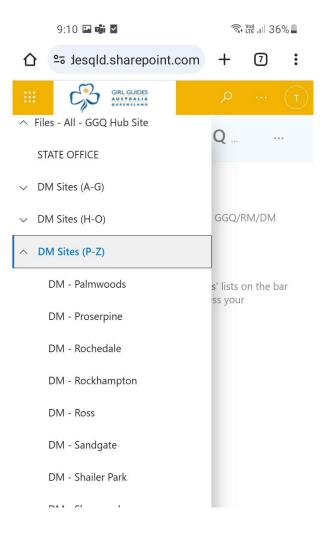
Once in the GGQ Hub Site you can select your own District/Region/Campsite SharePoint site from the drop-down list on the left hand side under the hamburger menu. Select the 'Files – All – GGQ Hub Site option;

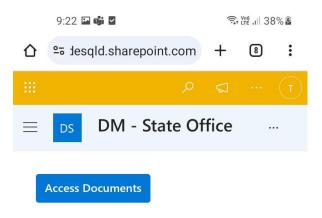


The Leader SharePoint sites are listed in groups alphabetically. Scroll down to the group that contains your site name and select that option.

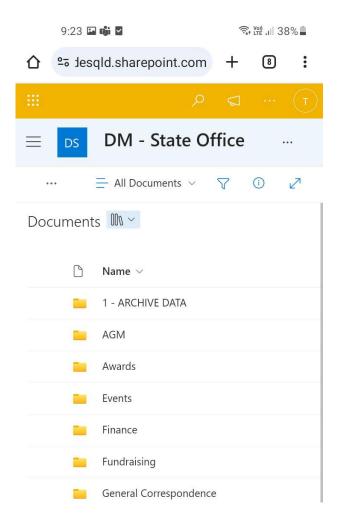


A final list will appear of all the sites in that group and you can select yours.





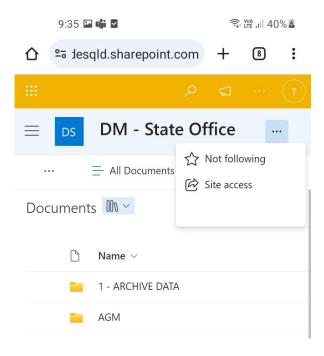
Your SharePoint site will open with a button which reads 'Access Documents'. Click on the button to proceed to your documents.



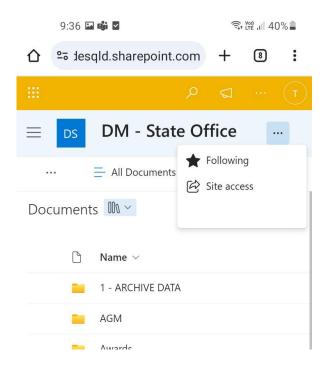
The Documents folder is your home folder where documents will be stored. Inside the Documents folder, there is a single other folder called '1 – ARCHIVE DATA'. This is where you should put any files which are obsolete and no longer in use.

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'.

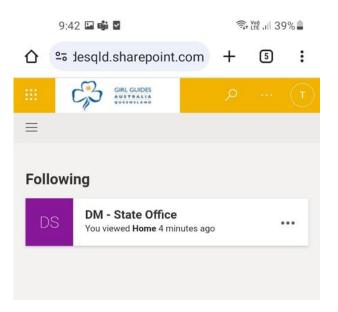


If you click on the blank star, the star will become filled and the text will change to 'Following'. When you follow a site, the system creates a shortcut on your SharePoint home page that will take you directly to your site in future.



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

	SharePoint Description Descripti Description Description Description Description Descripti			
ධ Files - All - GGQ Hub Site	STATE OFFICE DM Sites (A-G) \lor DM Sites (H-O) \lor D	M Sites (P-Z) 🗸 🛛 R	M Sites (A-Z) 🕓 Camp	Sites (A-Z) 🗸
DS DM - Stat	e Office			🟠 Not following 🛛 🚳 Site access
Documents	+ New -> T Upload -> 🕀 Edit in grid view	🥰 Sync 🗔 Pin ta	o Quick access	⊟ All Documents ∨ ♥ ① 2 ⁿ
) Recycle bin	Documents 🕅 🗸			
2	🗅 Name 🗸	Modified \vee	Modified By $ \sim $	Document Type \lor Status \lor Unit \lor
	21 - ARCHIVE DATA	5 hours ago	Dominic Sumich	
	^{3'} AGM	3 hours ago	testDM@guidesqld.org	
	🔿 😑 ³⁷ Awards 🕑 …	3 hours ago	testDM@guidesqld.org	
	Events	3 hours ago	testDM@guidesqld.org	
	Finance	3 hours ago	testDM@guidesqld.org	
	🐂 ²⁷ Fundraising	3 hours ago	testDM@guidesqld.org	
	General Correspondence	3 hours ago	testDM@guidesqld.org	
	Leader Reviews	3 hours ago	testDM@guidesqld.org	
	Marketing	3 hours ago	testDM@guidesqld.org	
	Meetings	3 hours ago	testDM@guidesqld.org	
	Cutdoors State	3 hours ago	testDM@guidesqld.org	
	People Management	3 hours ago	testDM@guidesqld.org	
Return to classic SharePoint	<u> </u>	*********	Acceleration and a second second	

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.

DS DM - State	Office			
Documents	+ New ✓ T Upload ✓ ⊞ Edit in grid view	🖻 Share 👄 Copy	link 🧣 Sync 🛓	Download 🖓 Autom
Recycle bin	Documents > Finance > 2024			
eturn to classic SharePoint	🗅 Name 🗸	Modified $ \sim $	Modified By $ \sim $	Document Type $ \smallsetminus $
	📥 ²⁴ A_January	About a minute ago	digitaltraining@guides	ql
	[™] B_February	About a minute ago	digitaltraining@guides	ql
	[™] C_March	A few seconds ago	digitaltraining@guides	ql

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):

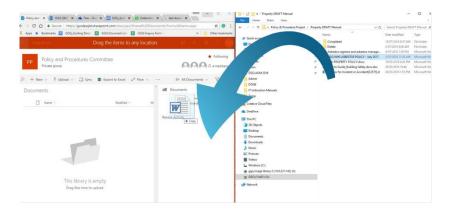
- Key holders for property
- Learning partners
- Unit meeting details (time/days etc.)
- List of district bank accounts, branch, account numbers, signatories, and use of an account
- Support Group details
- Property leases agreements, sub-letting agreements, LTOs
- Units/districts in recess or closed
- 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

+ New 🗸 📅 Upload V 🜐 Edit in grid view 🥁 Sync 🛛 🗔 Pin to Quick access 🕫 Automate	~ …
---	-----

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

ile N lew	Home Send / Receive Folder View Developer Help Acrobat ♥ Tell m		← → C	StateO Q 🛧 🕻	lincognito lice
nail Ne	tems · · · · · · · · · · · · · · · · · · ·	~	= SharePoint	₩ G ²	@ ?
	GRepty GRepty All GForward @M F Trie 21/01/2020 1240 PM Trie 22/01/2020 1240 PM		GGQ State Offic Private group ★ Fo	lowing 🖙 Next steps	R 23 members
	FW: Roster	1	,⊅ Search + New ∽ ···	\equiv All Documents \vee	702
n soudanoou	To OGQ Outdoors Cc Osupport@guidesqid.org: Owebmaster@guidesqid.org	~	Documents > Technology Management >	Database	
	I'm proposing possible dates for Girl guide roster weekends (GGQ Outdoors) dock		botamene reemology management	batabase	
	Ment Matter Store		🗅 Name 🗠	Modified \sim	Modified By $^{\vee}$
	Invoice INV-5593.pdf 139 KB		Dashboards	January 9, 2019	database@guides
	Hi Donna,		Data Import	May 28, 2019	database@guide
	The approved dates for the roster days are usually advertised in Qotg and can be put on		External Contact Database	March 5, 2019	database@guide
	the website under the Outdoors tab. For this to happen Kirby would need definite dates		iMIS Community Review	January 9, 2019	database@guide
	along with the prices per person.		iMIS Database Development	January 9, 2019	database@guide
	As discussed late last year I believe the fees for the roster days need to be increased to cover the costs, especially if one of the days are cancelled. Have you looked into this?		Media Consent Project	January 9, 2019	database@guide
	Camp Hill District still owe for the October 2019 roster day invoice. I've emailed the		Change Process - District Addresses.docx	December 3, 2018	database@guide
	District Manager and Region Manager a number of times regarding this and haven't			der - Recording Now	×
	received a response. It would be appreciated if you could follow this up. If they refuse to	*			

- 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 <u>webmaster@guidesqld.org</u> 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

109) Open 🗸 🖻 Share 🐵 Copy link	🛓 Download 🛋 Ren	aame 💼 Delete \cdots 🛛 == All Documents 🗸
0	🗋 Name 🗸	Modified >>	Modified By \sim
0	Gffice365 Manual.pdf	18 minutes ago	Guides Qld Webmaster

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.

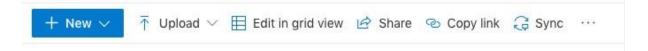
Only approved tags should be used when tagging documents. Please see below the approved tags to use for your documents by role;

	Region Manager	District manager	Campsite
Tags	Region Manager DM Reviews Finance General Correspondence Issues Meetings Outdoors Partnerships/Sponsorships People Management Region Events Region Property Region Team Reports Resources	District managerAGMAwardsCorrespondenceDistrict minutesEventsFinanceFundraisingGeneralLeader reviewsMaintenancemanagementMarketingMembership	Campsite AGM Bookings Finance General Correspondence Maintenance Meetings Outdoors People Management Property Risk Template
	Templates Trefoil	Outdoors People Property Resources Support group minutes 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.

cun	nent	s					
0		Name \vee	Modified \vee	Modified By \smallsetminus	Document Type \vee	Status \vee	District
0		1 - ARCHIVE DATA	July 12	ggqadmin dsumich]	
0		201030 OUT.3 Camp Report Iluka District.pdf	Yesterday at 5:44 AM	Michelle McCann	Outdoors		
		201117 Faith Christian School LTO.pdf	August 1	Michelle McCann	Region Property	Complete	
		210101 Checklist for finances and end of year audit.pdf	June 12	Michelle McCann	Finance		

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 dropdown 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 <u>webmaster@guidesqld.org</u> - 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**.

			Open	>	
	\Box	Name 🗸	Preview		lodif
		1 - ARCHIVE DATA	Share		gqadr
0		191231 St Lucia Gumnut Audite 🖻 🗄	Copy link		atasha
		19890619 1989 Sale of Annerly Hut & Regi	Manage access		atasha
		200120 Free Being Me Leaders Resource.pdf	Download Delete		atashi
		200420 QF.IP.15 Business Case Relinquish o	Automate	>	atasha
		200511 Blue Card Application Montesalvo,	Rename		atasha
		200709 St Lucia Brownies.jpg	Move to		atasha
		200805 Application QF.AD.01 State Position	Copy to		atasha
		200805 Surf Safe Online Reputation Resour	Version history		atasha
		200805 Surf Safe Screen Time Resource .pptx	Alert me More	>	atasha
		200806 Surf Safe Minister Welcome.jpg	Details		atash

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.

	Î	191231 St Lucia Gumnut A	···· ×
	- 1	Properties	Edit all
Document Type $arphi$	Statu	🗋 Name *	
		191231 St Lucia Gumnut Audited Accounts.pdf	
Finance	Compl	Title	
Region Property	Compl	Enter value here	
Resources		⊘ Document Type	
Region Property	Outsta	Finance	
People Management	Compl	⊘ Status	
r copie management	compi	Complete	
		≣ District	
People Management	Compl	St Lucia	
Resources			

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.

Document Type \vee	Status \vee
A to Z	
Z to A	
Filter by	e
Group by Docume	nt Type
Column settings	>
Totals	5

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.

Filter by 'Document Type'	\times
(Empty)	
Finance	
General Correspondence	
Issues	
Meetings	
Outdoors	
Partnerships/Sponsorship	
People Management	
Region Events	
Region Property	
Resources	
Trefoil	
Apply Clear all	

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

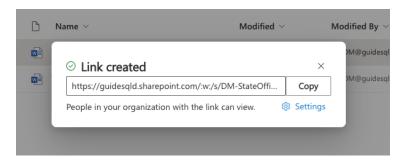
To allow GGQ users within the @guidesqld.org environment to view or edit your files click on the 3 dots to the right of the filename and select the 'Copy Link' option. Do not use the **Share** option.

+ New 🗸 🌐 Edit in grid view 🗧 Open 🗸 🖄	Share 🕞 Copy link	••• × 1 se
Documents > Finance	Open Preview	Σ
🕒 Name 🗸	Share	lodified By $ \smallsetminus $
⊘	Copy link	stDM@guidesqld.
2 2 QPP.AD.10 Leaders SharePoint Manual.docx	Manage access	stDM@guidesqld.
	Delete	
	Automate	Σ
	Favorite	
	Download	

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

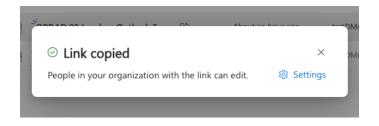
If you click on the settings link in the bottom right corner of the popup, you will see an expanded set of options for your link;

\leftarrow	Link settings QPPAD.09 Leaders Outlook Email Manual.docx	0	×
Share	the link with		
۲	Anyone ()		
0	People in Girl Guides Queensland Share with people in Girl Guides Queensland, organization account required.		۲
8	People with existing access ①		\bigcirc
٩	People you choose 🛈		\bigcirc
More	settings		
0	Can view		\sim
	Apply	Cano	el

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.

Mc	e settings		
0	Can view	~	
	Can edit Make any changes		
	Can review	anges	
	Can't download Can view, but not do	ownload	

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).

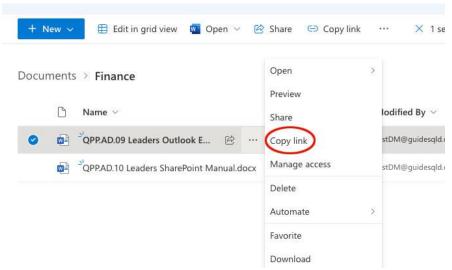


6.14 Allow external parties to access files in SharePoint

6.14.1 Allow external users to view your file

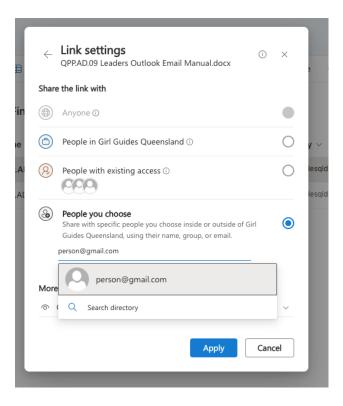
Please use this option with care and only share information with authorised people as per your role and Confidentiality and Non-Disclosure Agreement.

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.

	QPP.AD.09 Leaders Outlook Email Manual.docx	
Shar	e the link with	
۲	Anyone ①	
٥	People in Girl Guides Queensland \odot	\bigcirc
8	People with existing access ①	0
3	People you choose Share with specific people you choose inside or outside of Girl Guides Queensland, using their name, group, or email. person@gmail.com	۲
	person2@gmail.com	_
	person2@gmail.com	
	Q Search directory	
More		

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

	QPP.AD.09 Leaders Outlook Email Manual.docx	
Share	e the link with	
	Anyone 🛈	
٥	People in Girl Guides Queensland ①	С
8	People with existing access ①	С
	People you choose Share with specific people you choose inside or outside of Girl Guides Queensland, using their name, group, or email. Person@gmail.com Add another Person@gmail.com, and person2@gmail.com are outside of your organization.	
$^{\circ}$	Can view	/
	-	~

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.

×
෯ Settings

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.

Microsoft
Request Verification Code
You've received a secure link to: QPP.AD.09 Leaders Outlook Email Manual.docx To verify your identity, we'll send a code to you at jmacbrisbane@gmail.com.
Send Code
By clicking Send Code you allow Girl Guides Queensland to use your email address in accordance with their <u>privacy statement</u> .
© 2017 Microsoft Privacy & Cookies

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.

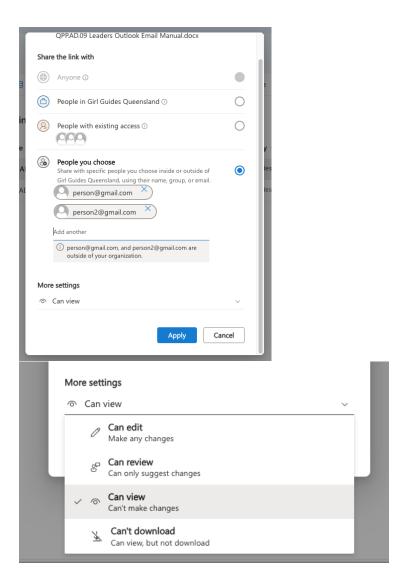
M	icrosoft	
Enter Verif	ication Code	
You've received a sec	ure link to:	
QPP.AD.09 Leaders Outlook Email Manual.docx		
To open this link, ente emailed to jmacbrisb <u>again</u>	er the code we just ane@gmail.com . <u>Send</u>	
Enter code	()	
Ve	erify	
Keep me signed i	n	
© 2017 Microsoft	Privacy & Cookies	

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