

SharePoint Training

For AMC Volunteers

Last Updated 6.5.19 – This is a detailed training manual for SharePoint—AMC’s intranet.

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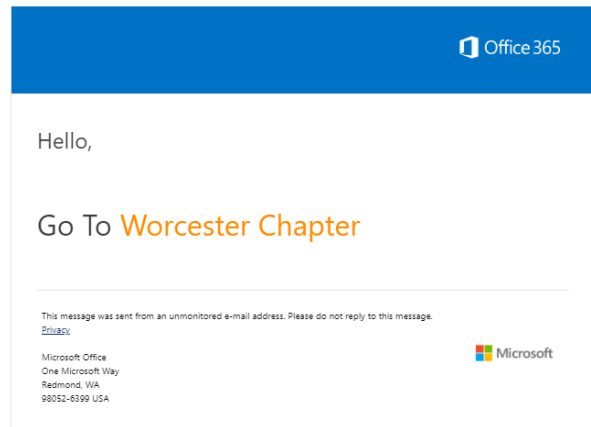
Create an account

See below for screenshots with detailed instructions on how to set up an account for SharePoint:

Invitation Email

You'll receive an email invitation from no-reply@sharepointonline.com with the subject line "Susannah Hatch wants to share [NAME OF GROUP]". The email will look like this:

Click the Group Name in the email, which appears in orange. (**Didn't receive the invitation email? Check your spam folder!**)



Welcome to SharePoint Online

If you do not have an organizational account (i.e. an outdoors.org email address), select the "Microsoft account" option on this screen:

Welcome to SharePoint Online

To accept your invitation, sign in with a Microsoft account or an account assigned to you by your organization. By signing in you allow Appalachian Mountain Club to use your basic profile (name and email address) in accordance with their privacy statement. Appalachian Mountain Club has not provided links to their terms for you to review. You can remove these permissions at myapps.microsoft.com.



Microsoft account

Sign in with the account you use for OneDrive, Xbox LIVE, Outlook.com, or other Microsoft services.



Organizational account

Sign in with the account provided by your work or school to use with Office 365 or other Microsoft services.

Don't have either account? [Create a Microsoft account, it's quick and easy!](#)

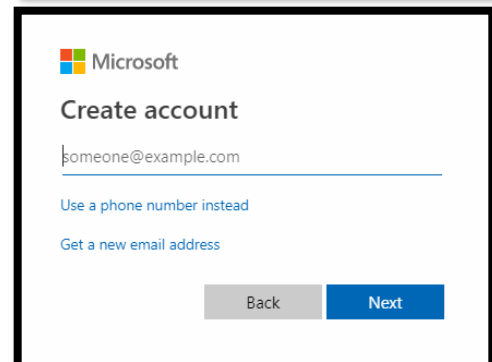
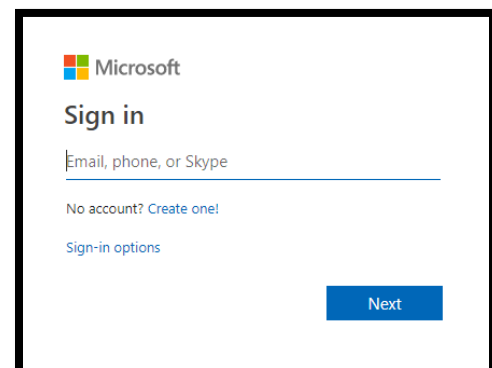
[Legal](#) | [Privacy](#)

Create Microsoft Account

1. On the screen at the right, select "Create One!" to create a Microsoft account—creating a Microsoft account is required to access the SharePoint sites.

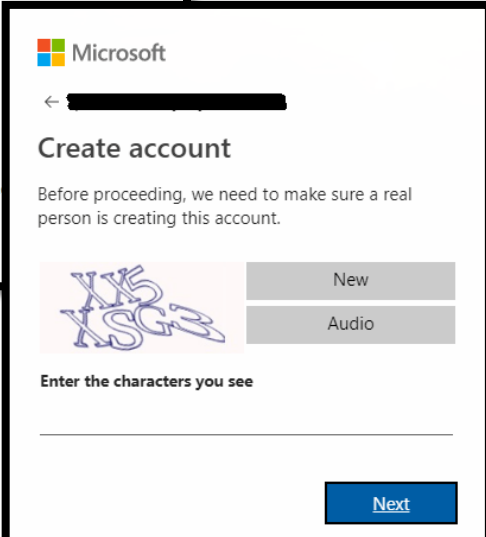
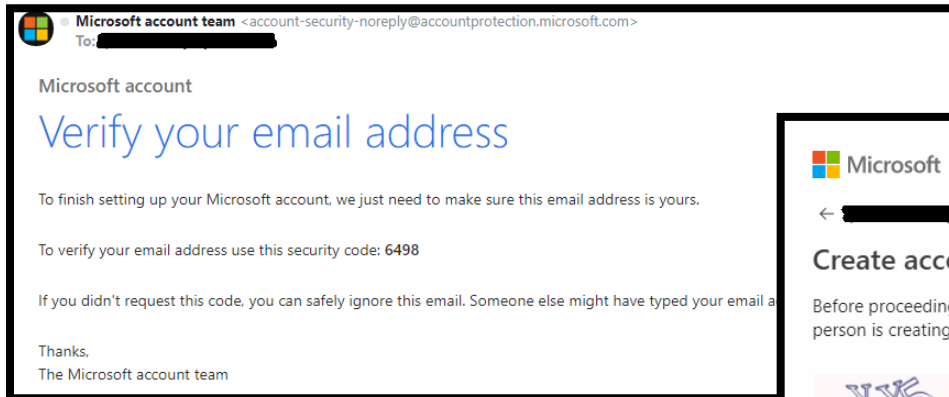
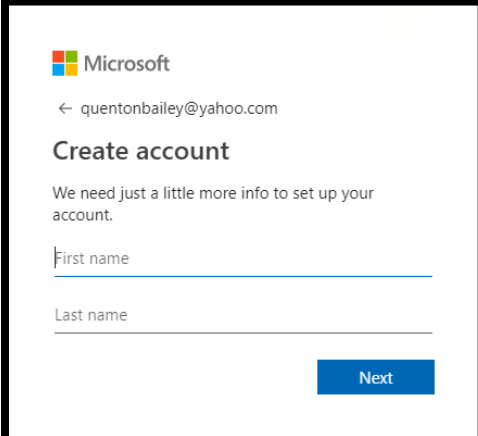
(Note: if you already have a Microsoft account associated with your personal email address, enter your email on this screen to login instead of creating an account, and then enter your Microsoft account password to login to the SharePoint online site.)

2. On the next screen at the bottom right, enter your email address and click "next." **Note: this must be the email address at which the invitation email to the SharePoint site was received.** If you'd prefer the invitation to be sent to a different email address, please email [Susannah Hatch](mailto:Susannah.Hatch).
3. **Password:** Once you enter your email address and click "Next," you will be invited to choose a



password for your Microsoft account—this password that you choose will be the one you will use to login to SharePoint moving forward.

4. **Account Information Details:** On the next 2 screens, you'll be asked to enter information about yourself, including: First Name, Last Name, Country/region, and Birthdate.
5. **Email Verification:** After you've entered your information and clicked "Next," you'll need to enter a verification code, which Microsoft will send to the email address you specified (the verification code email will look like the screenshot below). If you don't see the email with the code in your inbox, make sure to check your spam.



6. **Real Person Verification:** Next, they will verify you're a real person (see right) and will then ask you to check your security info (your email). Once you've done that, you should be directed straight to the SharePoint site to which you were invited! **See information below on how to login in future.**

Logging In

After you've set up your Microsoft account [following the above steps](#), you'll be able to follow these simple steps to login to SharePoint:

Navigate to: <https://appalachianmountainclub.sharepoint.com/sites/Volunteers>

Enter your SharePoint email and password

This is your personal email address, and the password you set up in the steps above (or the password that was previously associated with an existing Microsoft account).

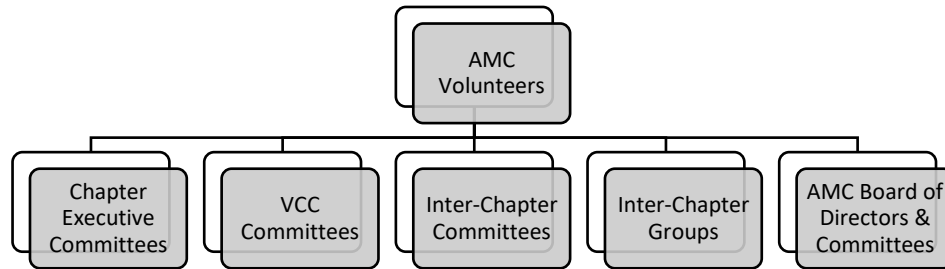
You're in!

See below for information on how to navigate and use SharePoint for your needs as an AMC Volunteer.

Site Structure & Permissions

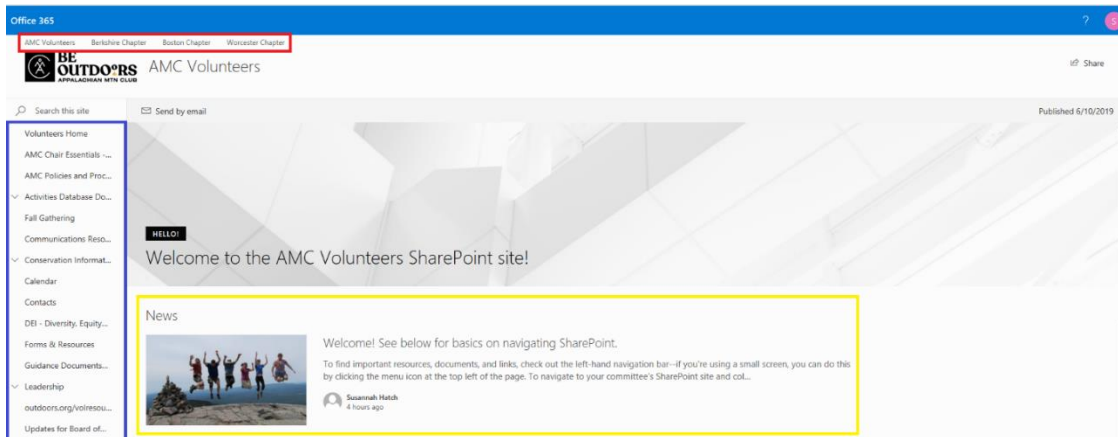
Site Map

The SharePoint sites for AMC Volunteer Club Units are set up as sub-sites under the AMC Volunteers home site. See below for a map of the site structure.



AMC Volunteers Home

The AMC Volunteers ‘Home’ SharePoint site is managed by AMC’s Volunteer Relations Department and contains many helpful resources and reference materials for AMC volunteers across the organization. Login to SharePoint by navigating to the [AMC Volunteers Home](#) so you can see important updates and announcements on the home page (outlined in yellow in screenshot below).



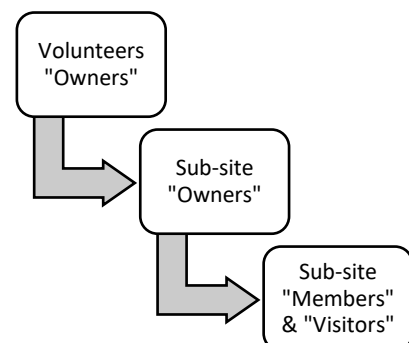
The AMC Volunteers SharePoint site is organized into document folders and libraries, which can be found in the left-hand sidebar (outlined in blue) along with links to other online resources for AMC Volunteers—this Volunteers Home is a one-stop-shop for all online resources for AMC Volunteers.

Volunteer Committee Sub-Sites

As demonstrated in the site map above, the following AMC Volunteer Club Units have SharePoint sub-sites which they can use to collaborate: Chapter Executive Committees, Volunteer-led Camps & Cabins (VCCs) Committees, Inter-Chapter Committees/Groups, and AMC Board of Directors & Committees. All the sites you have access to will show in the top navigation bar (in red above).

Permissions

All volunteer SharePoint users have “Read” access to the AMC Volunteers site. There are three volunteer permissions levels for the sub-sites: “owners,” “members,” and “visitors.” *Owners* have full control—they can edit content and site structure as well as grant/remove access for site ‘members’ and ‘visitors.’ *Members* have “contribute” permissions—they can add/edit documents and site content. *Visitors* have “read-only” access—they can only view and download documents and content. See the map at right for who can edit permissions (add/remove users) for which groups.



Why should I use SharePoint?

Volunteers Home

This site is the place to go for onboarding resources, documents, and information. It is managed by AMC's Volunteer Relations Department for all volunteers with access to SharePoint. Need to find information about policies, important dates, or sample documents and templates? This is the place to go! We are working to integrate this Volunteers Home with other online resource libraries such as outdoors.org/volresources so it can be a one-stop-shop for resources and information.

Committee Sub-Sites

Your committee SharePoint site is an important tool for **collaboration** and **succession**. For collaboration, you can use your committee site to share and work together on documents, maintain a group calendar, have discussions, keep track of tasks, and more.

Volunteer Succession: SharePoint is an extremely important tool for volunteer succession—it helps foster smooth transitions. All members of committees should maintain records relevant to their positions so that the next volunteer in that position will automatically have access to them—the transfer of information and resources makes the life of a new volunteer much easier.

For example: your committee had a dedicated Program Chair who moved away and has fallen out of contact. This Program Chair organized countless events and had event planning down to a science—they have lists of contacts at facilities, budget spreadsheets, and other documentation that would be extremely useful to the next volunteer in that position, so they don't have to reinvent the wheel. If it was common practice for the Program Chair to keep these important documents in a "Program Chair" document library, all that valuable information would be available to future Program Chairs!

How should my committee use SharePoint?

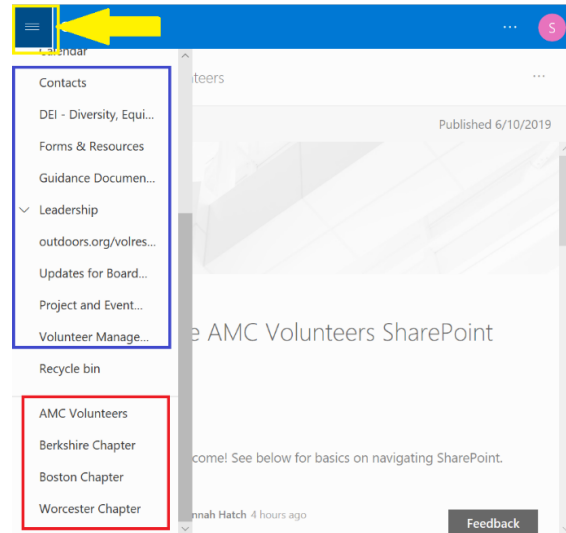
Here is a list of examples and best practices of how your committee can leverage SharePoint:

- **Document Storage and Collaboration**
 - o Committee Chair Folders/Document Libraries (e.g. "Hiking Committee", "Treasurer")
 - o Event Planning Document Folders/Libraries (e.g. "Annual Meeting 2019")
 - o Meeting Minutes
 - o Meeting Agendas and Committee Reports
 - o Annual Reports
 - o Bylaws, Guidelines, Policies
 - o Forms, Reports, etc.
- **News and Announcements**
 - o Comments & Discussion
- **Group Calendar**
- **Task/Action Item Management**
 - o Would need to add "Task List" App
- **Photos for Communications**
 - o Would need to add "Picture Library" App, or store photos in document library
- **Newsletter Content**
- **Training/Onboarding Materials for New Committee Members**

Navigation

Top Ribbon: To navigate between sites, such as from the AMC Volunteers site to your committee site, use the ribbon at the top of the page (outlined in red in the screenshot on page 4 **TKTK**). If you are using a small screen or browser window, this will appear in the bottom of the left-hand sidebar, outlined in red at right:

Left-hand sidebar or “Quick Launch”: This menu (highlighted in blue on page 4 and at right) is different for each site, so it changes depending what site you are on. To get to the left-hand sidebar on a smaller screen or in the SharePoint app, click the menu icon at the top left of the screen (in yellow in the screenshot at right).



Search: Looking for something specific, or can't find what you're looking for? There is a search bar in the left-hand sidebar that can be used to search for something within the site you are currently visiting.

Document Libraries

See below for how to upload, download, and edit documents and libraries on committee sites.

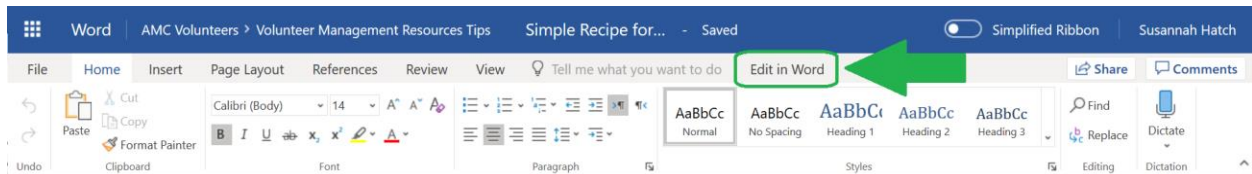
Uploading and Downloading Documents

There are several ways you can do this. First, navigate to the document library and/or folder to which you'd like to add files. Then you can either click “Upload” and select the files you'd like to add OR drag and drop files from your computer directly into the SharePoint folder.

Downloading Files: Navigate to the file you'd like to download and click the three dots to the right of the document name—select “download.” You can do this with multiple files by checking the ones you want before clicking the action icon.

Viewing/Editing/Updating Documents

To view a document, just click the name and it will open the document in the web version of Word, Excel, etc. You can make changes to the document directly in the web program OR you can select the “Edit in Word” or “Edit in Excel” button highlighted in the screenshot below (this will only work if you have Microsoft Office installed on your computer).



Note—the web versions of these programs do not offer the full range of functionality of Microsoft Office such as “track changes,” so keep this option in mind if you cannot find what you need.



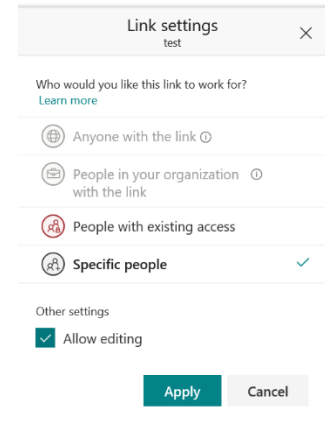
If you select “Open in Word,” you can turn “autosave” on—this means it will sync edits automatically to SharePoint (see left).

Sharing Documents & Folders

Only members of the committee have access to your committee SharePoint site, but you can share specific folders and documents with people who are not members of the SharePoint site. *For example, only Chapter Executive Committee Members have access to Chapter SharePoint sites—but if you're the Communications Chair on the Executive Committee, you can create a folder in the document library for the Communications Committee and invite your committee members to it.* To do this, select the folder or document you'd like to share, and then click the "share" icon (see below).

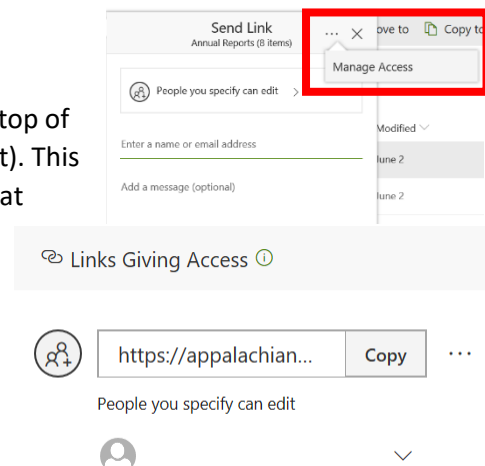


The default screen that will come up will allow the specific people you designate to edit the document or folder. To give these emails "view only" permissions, click "People you specify can edit" and uncheck "Allow editing"—see screenshot at right. Select "Apply," enter the email addresses on the next screen, and click "Send."



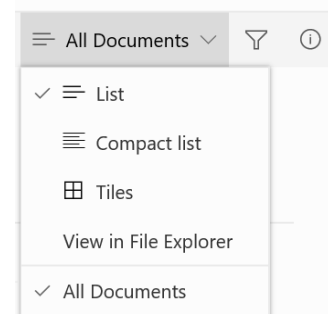
The people you designate will receive this invitation in an email with a link to the shared item—to access it, they will have to login with their Microsoft account (or create one). These users can bookmark the link in their browser or save the email invitation to access the folder in future.

Links Giving Access to documents or folders can be removed by clicking the "share" icon and then clicking the three dots at the top of the pop up—click "Manage Access" (in red in screenshot at right). This will bring up a menu on the right of the screen with a section that looks like the screenshot at the bottom right—if you click on the three dots next to the link, you can delete the link. Once you delete the link, the people that you invited to the folder/documents will no longer be able to access them.



Organizing Document Libraries

To move or reorganize multiple files or folders, select the ones you'd like to move and then click "Move." It will allow you to select which folder to put the files and folders in. If you want to reorganize files in File Explorer on your computer, you can do this using Internet Explorer. Navigate to your document library and click "All Documents" on the right—select the "View in File Explorer" option pictured at right. This will open all your site documents in your computer's File Explorer, so you can drag & drop and reorganize files more easily.



News & Announcements

Volunteers Home News: The "News" section of the Volunteers Home will contain important updates and announcements, so when you login to SharePoint, make sure you keep your eye on that section!

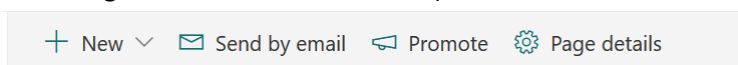
Sub-Site News: All members of sub-sites can add a News Item or News Link to the home page of their committee SharePoint site. To do this, navigate to your committee site, and click "+ Add" under the

“News” section. “News Link” allows you to add a link to a website in the news section. “News Post” allows you to add a title, text, an image, a link, a document library—you name it! Here’s a video from Microsoft about how to create and edit a news post: <https://www.microsoft.com/en-us/videoplayer/embed/RE2ZpSM?pid=ocpVideo0-innerdiv-oneplayer&postJsllMsg=true&maskLevel=20&market=en-us>

Note—if creating a News Post with columns, the columns on the right will wrap under columns on the left in mobile view (small screen or in the app). So if you want your text content in a news post to be at the top of the fold in the mobile view, make sure to put it in the left-hand column in your news post.

When you’ve created a News Post, you can push it out to committee members in three different ways:

- 1) *With SharePoint site members only:* You can “@ tag” someone in your group in the Comments section of the news post by typing “@” and the person’s name or email address (members of the site can also @ tag others to start discussions).



- 2) Select “Send by email” and enter the email addresses you’d like to send the news post to.
- 3) *Sub-site “Owners” Only:* Click “Promote” to add the post to the left-hand navigation.

Calendars

Volunteers Home Calendar: this calendar contains dates for important clubwide events such as the Fall Gathering, Annual Summit, and trainings. It also contains dates for chapter communications windows and deadlines. If you’d like an event to be added to this calendar, contact [Volunteer Relations](#).

Sub-Site Calendar: All committee sub-sites have a calendar that is accessible in the left-hand sidebar. All members of sub-sites can add and edit calendar events—you can use this to keep a calendar of important dates, such as the annual meeting, spring picnic, leadership training, Executive Committee meetings, etc.

Alerts/Notifications

Mobile “Push” Notifications

If you download the SharePoint mobile app and allow it to send you notifications, you can receive the following push notifications:

- “Interesting News” – Posts that might interest you
- “Comments” – Comments on your pages and replies to your comments
- “Mentions in Comments” – You are mentioned in comments or comment replies

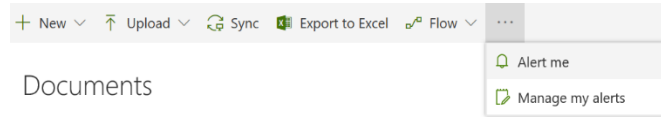
Email Notifications

@ tags: You will receive an email if someone “@ tags” you in a comment, comment reply, or post.

News Posts: You can also receive emails if a group member creates a News Post and opts to send it by email (described in News & Announcements section above).

Alerts

If you'd like to keep tabs on a SharePoint site (either the AMC Volunteers site or your committee's sub-site), you can set alerts. Alerts can be set on many things within SharePoint, including on a document library, folder, or document. You can set an alert by navigating to the page, library, or folder you want to receive alerts for, then click the three dots at right and select "alert me."



You can select the following options for the alert:

- Alert Title (Email subject line)
- Delivery method: email or text message
- Change type—receive alerts for:
 - o All changes
 - o New items added
 - o Existing items modified
 - o Items are deleted
- Alert for these changes:
 - o Anything changes
 - o Someone else changes a document
 - o Someone else changes a document created by me
 - o Someone else changes a document last modified by me
- When:
 - o Immediately
 - o Daily summary
 - o Weekly summary

If you have multiple alerts set up, select "Manage my alerts" to see them all and edit or remove them.

Site Management for Site "Owners" – see separate training document!