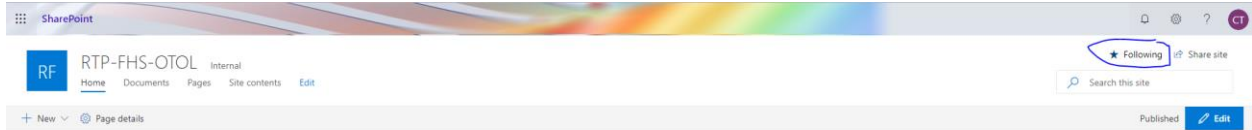


*****You need to use Google Chrome for SharePoint to work properly*****

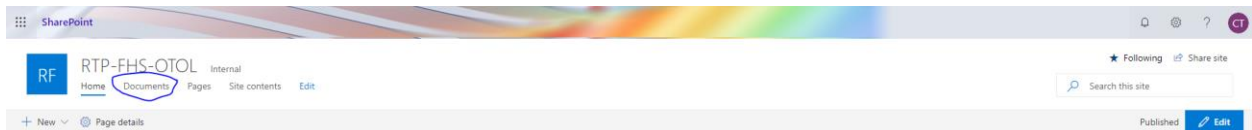
When you open the SharePoint link follow the page so it appears in your “Following list”.



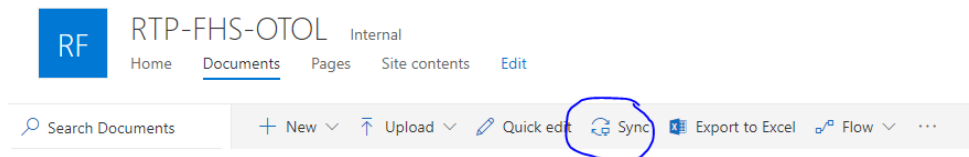
Syncing SharePoint to Your Computer

Syncing SharePoint to your computer allows you to easily create folders and upload/download files.

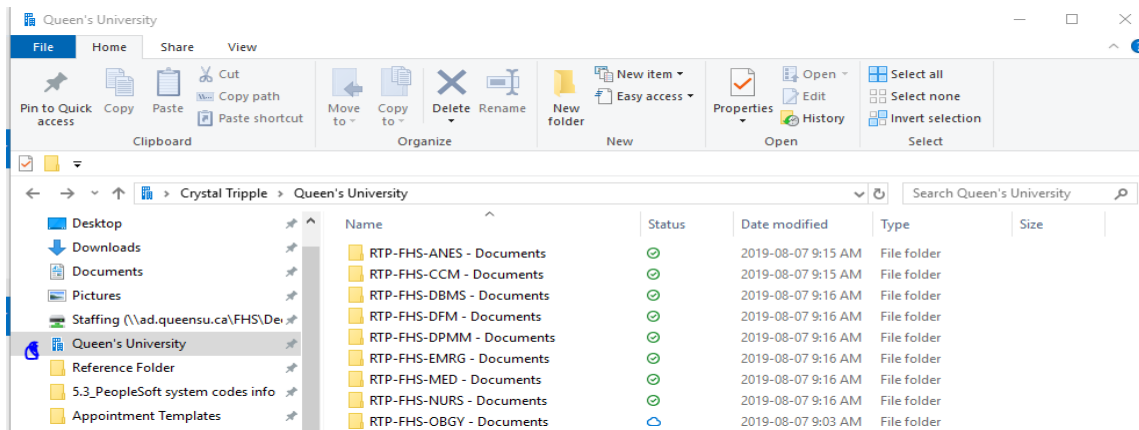
When you open your department page click on the “Documents” tab



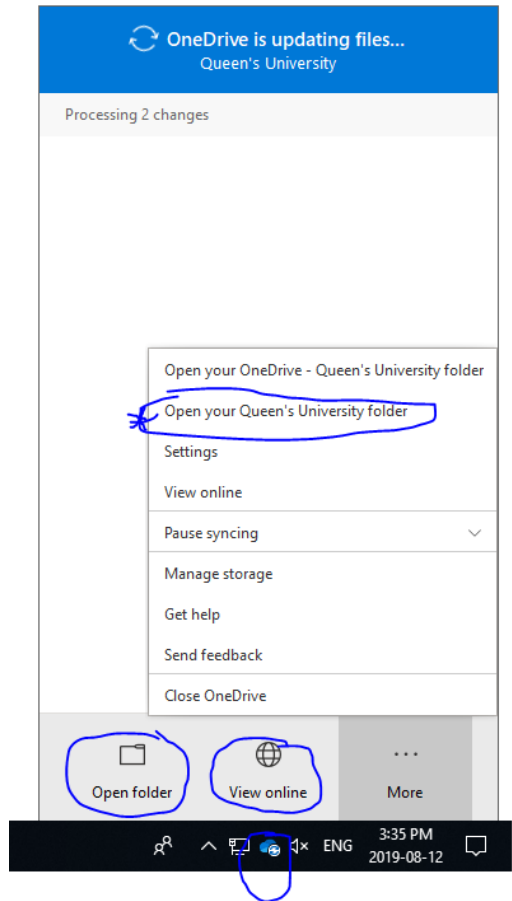
This will bring up the RTP folders we have set up for your Department. Now you will want to click the “Sync” button.



It will now prompt you to open Microsoft OneDrive. Follow the instructions on the screen. You may be required to update OneDrive. At the end tour will give you the option to open the folder. Once you open the folder remember to “Pin to quick access” so you can easily find the folder. You can do this by right clicking the folder name will “Queen’s University” and then clicking “Pin to Quick Access”.



****If you notice that SharePoint browser hasn't synced with the computer (or vice versa) after you upload documents click the “Sync” button again” in the SharePoint browser****

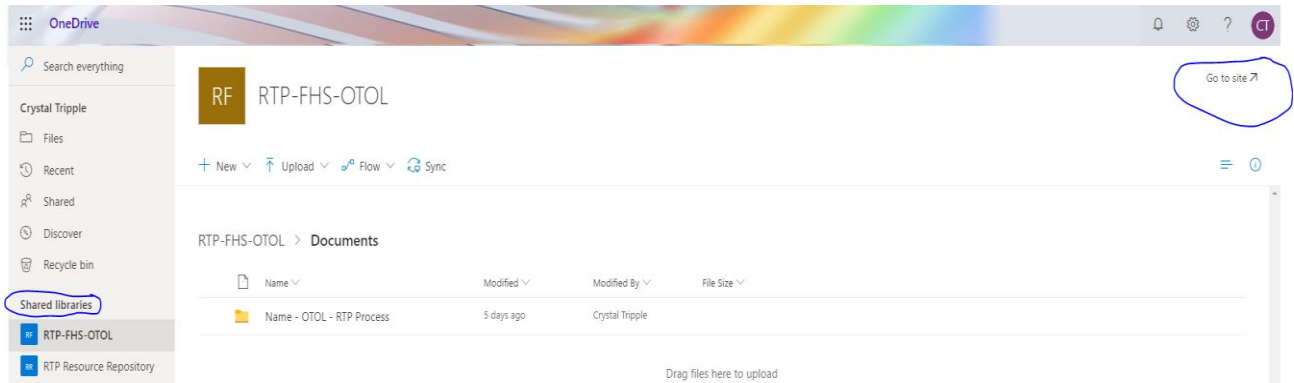


From your desktop you can also manage SharePoint. Once synced to your computer it should show up as a blue cloud in the bottom right hand side.

The box that appears will give you options on managing OneDrive and will show you the how many, if any, documents it is processing (i.e., syncing)

You can click “View Online” to be taken directly to the web browser for SharePoint. This brings you to your personal OneDrive. You will have to click your RTP Library located on the left of the browser. This version of SharePoint does not allow you to manage permissions. To manage permissions, you will then want to click “Go to site” in the top right side (see below image).

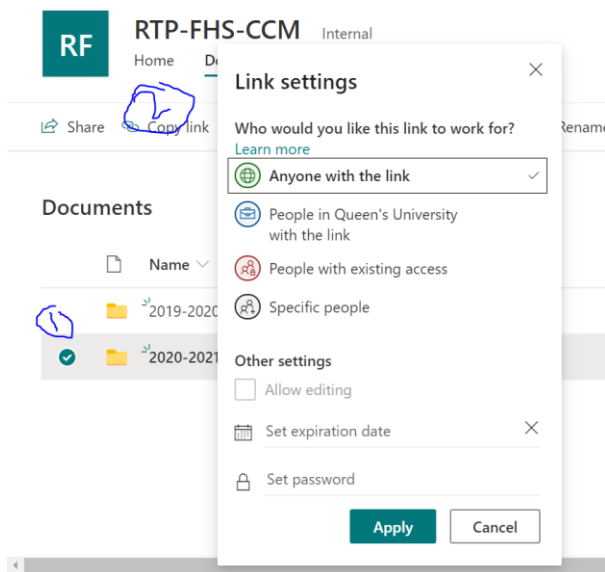
Clicking “Open Folder” will open your personal OneDrive storage and NOT the RTP SharePoint folder. To open the RTP folder click “More” and then from the menu that pops up click “Open your Queen’s University folder”.



Granting Permissions

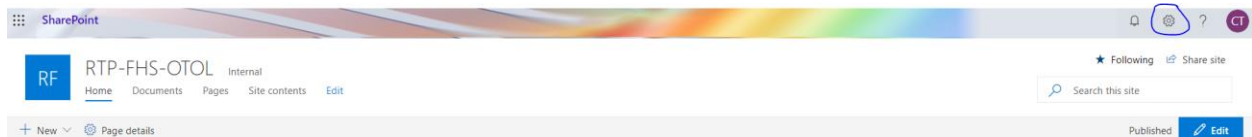
Using the Ticket Option – This will allow you to easily share the files with individuals outside of Queen's.

- Select the file or folder you wish to share.
- Click “Copy link”
- A menu will appear and will automatically have the permission set as “People with existing access can use the link”. To change this, click on it.
- More options will appear. You want to select “Anyone with the link”. Then assign an expiration date for the link and a password. No one should be given access to “allow editing”.

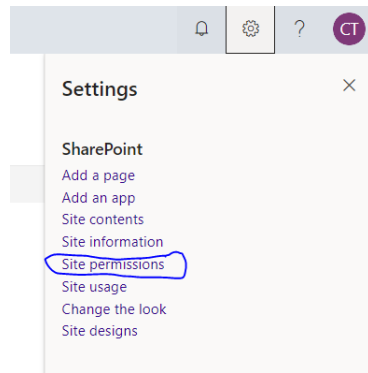


Using Groups

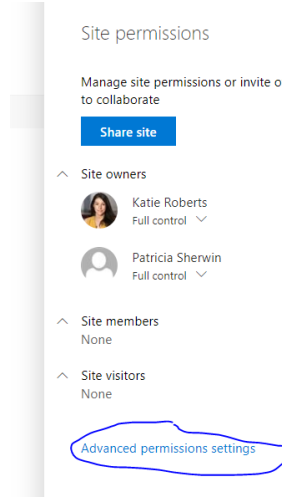
- Using Groups – Section A Step 3 in Provost Handout titled “Recommended Electronic Renewal, Tenure and Promotion (RTP) File Process using Microsoft SharePoint Online Communication Sites”
- **Colleagues – Creating a Group**
 - You can only add individuals to a group if they have a **Queen's email**
 - Click the gear



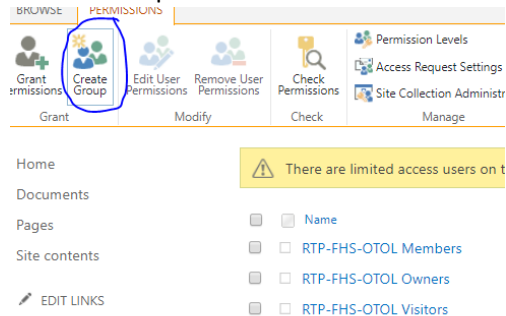
- Then Site Permissions



- Then advanced permissions settings



- Create Group



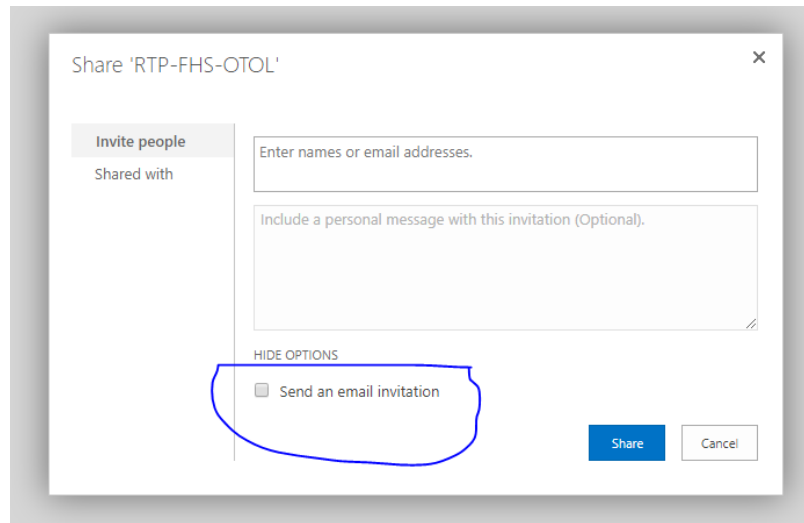
- Add the name and the information in the “About Me” section. Leave the rest of the options as they are.
- In the name I suggest adding the initials of the applicant this group is for.
 - FHS-RTP-OTOL-CT-Colleagues
 - FHS-RTP-OTOL-Committee

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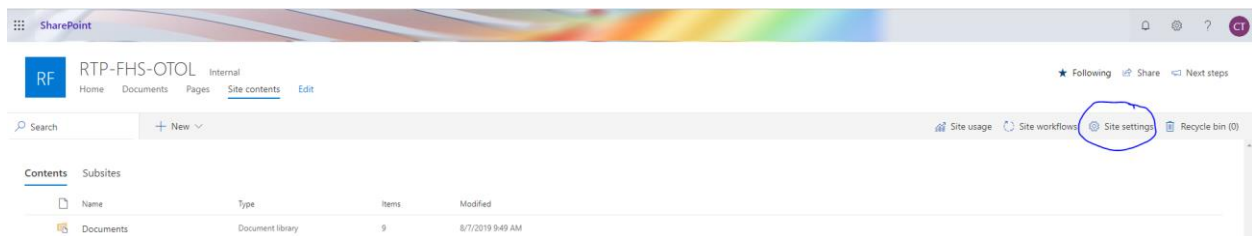
- Then click “Create”.

- Once you click “Create it should take you to the Group you just created. From here click “New” and add in the Queen’s emails that you want to give access.
 - From this page you can also remove users, which you can do under the “Actions” tab

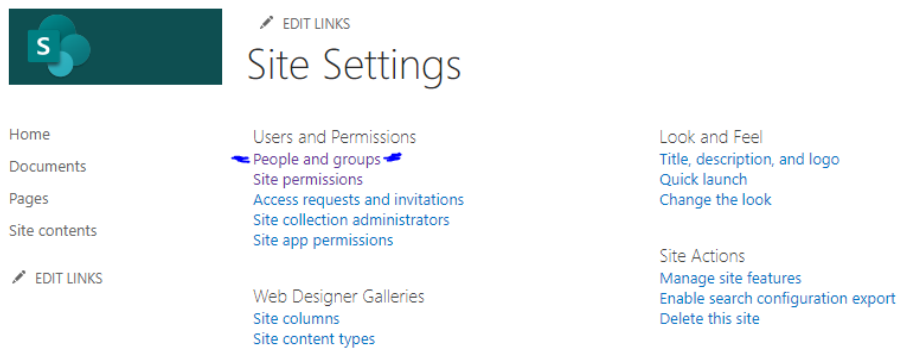
- Enter in all of the names of the people you want to add to this Group. Click the “Show Options” button. **Unclick** “Send an email invitation” – you will send an invitation when you link the Group to the folder you want them to have access to. Then click “Share”



- If you were not taken directly to the Group you created, or need to go back to later, go to “Site Contents”. Then click on “site settings”

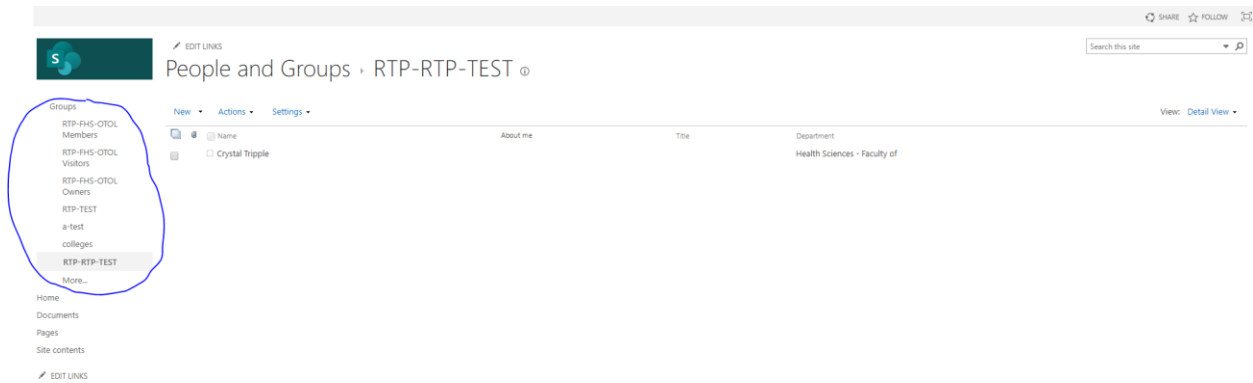


- Under “Users and Permission” click on “People and Groups”

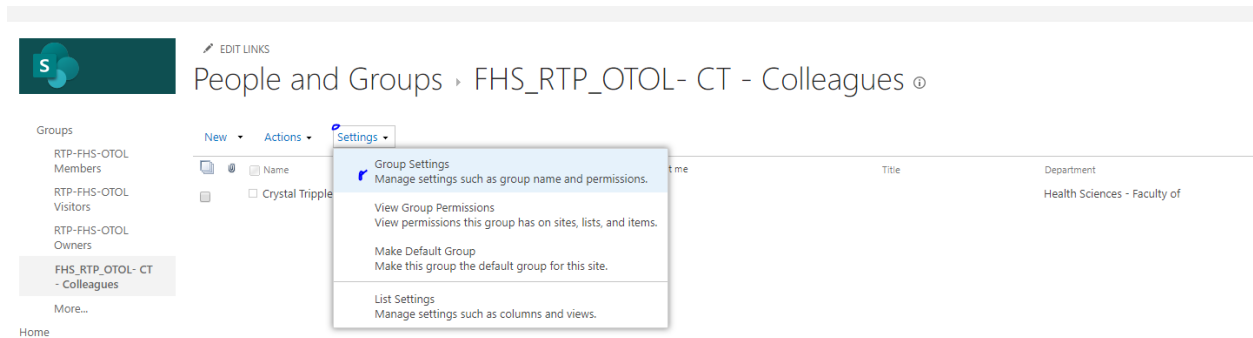


- Click on the group you want to edit from the left hand side. This will open the list of individuals who have access.

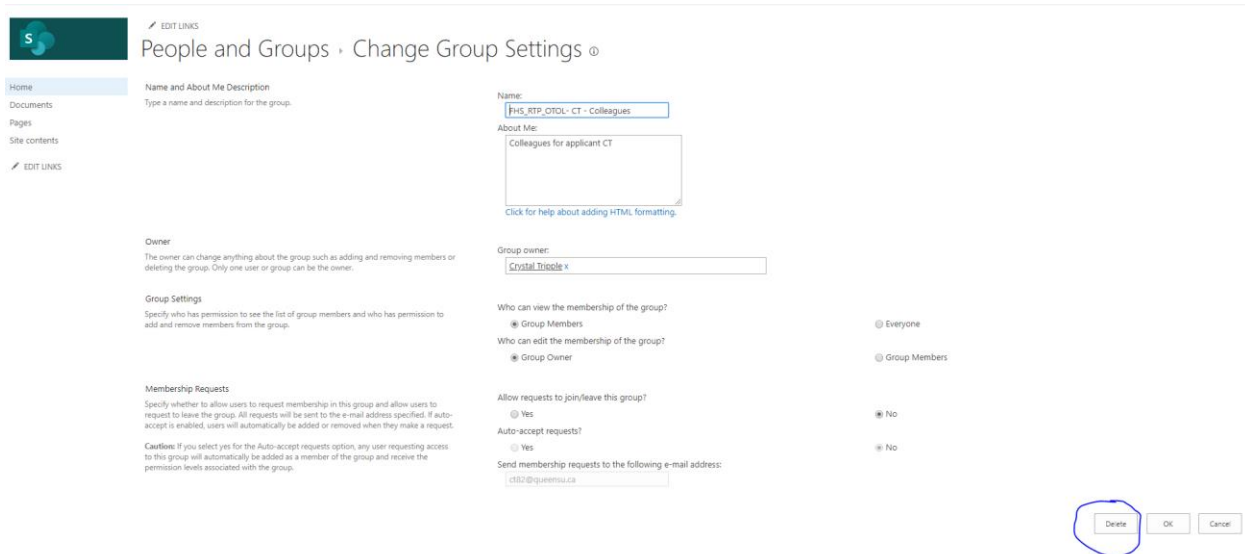
SharePoint - Updated August 2020



- To delete a group Click the “Settings” tab and then click “Group Settings”.



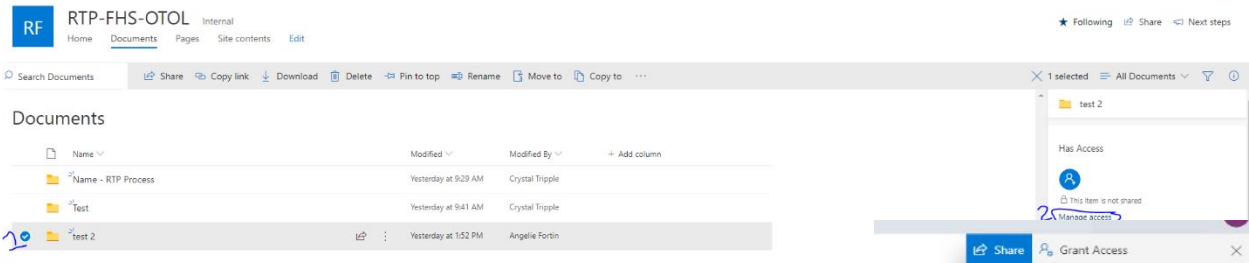
- Then click “delete”



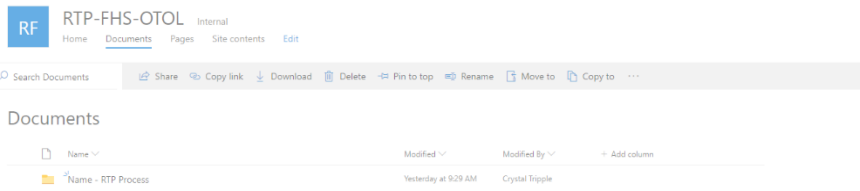
- Linking the Group to the Folder – **Do only when you want to START giving access to the folder**
 - Go to the “Documents” page –located either on the left hand side of the page (as in above image) or on the top under the site name (as in below image).

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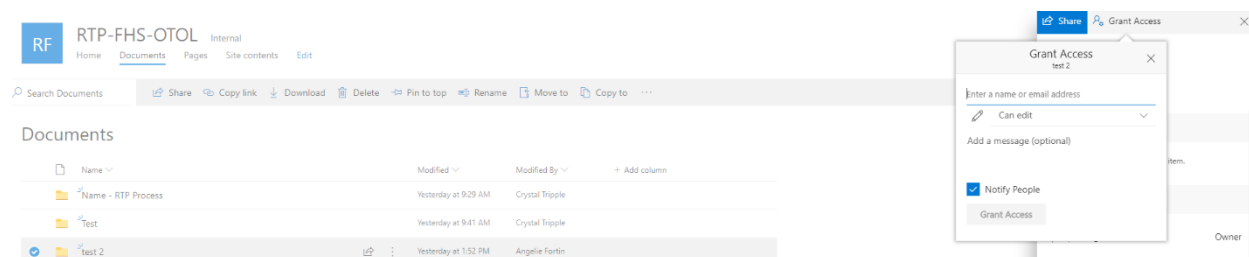
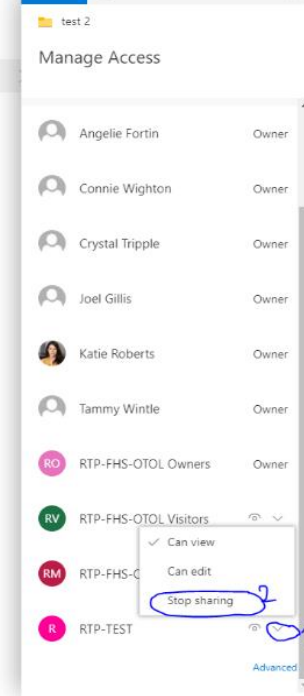
- Click the circle beside the folder/file name, it should turn blue with a white check mark.
- On the right side details about the folder/file should appear. If not click the button with the 'i' in a circle. Then click "Manage access".



- Next click "Grant Access"
 - Note – in some cases the "Grant Access" button is not appearing on the top. Instead a button will appear beside the "Direct Access" row lower down in the menu. Click the plus sign and then grant access. Click that and then follow the next steps below.



- Type in the Group name (or person) that you want to give access and adjust the access permission to "Can view". Be sure to add in a message before clicking the "Grant Access" button. **This will only work if they have a Queen's University email**



- If you do not have "Notify People" checked, or need to resend the link you can click the folder/file you want to share and then click the "Copy Link" button which you can send to them through your email

• Groups – Removing access

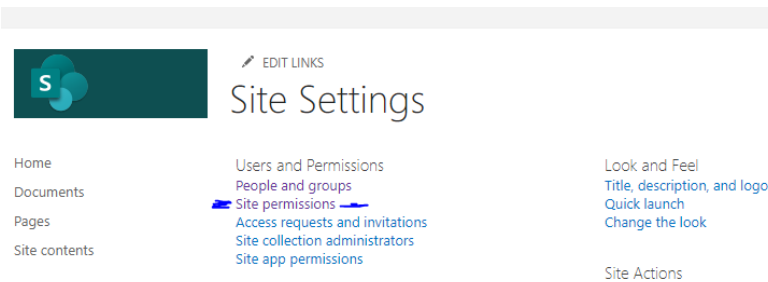
- Click the circle beside the folder/file name, it should turn blue with a white check mark, then go to “Manage access” – see the first image in linking groups to folders.
- Find the group you want to stop sharing with. Click the downward arrow to the right of their name. Then click “Stop sharing”.
- The group will be removed from the list.

- **Groups – Checking Permissions**

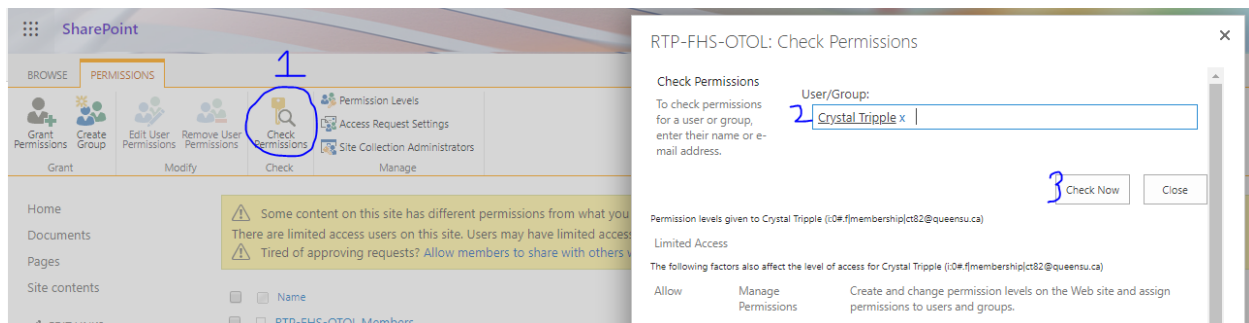
- First go to “Site Contents” then go to “Site Settings”



- Click “Site Permissions”



- Now click on “Check Permissions”, this will open up a pop up. Enter the user name or the Group you want to check the permissions for and click “Check Now”. You will now see a list of all permissions that person or group has.

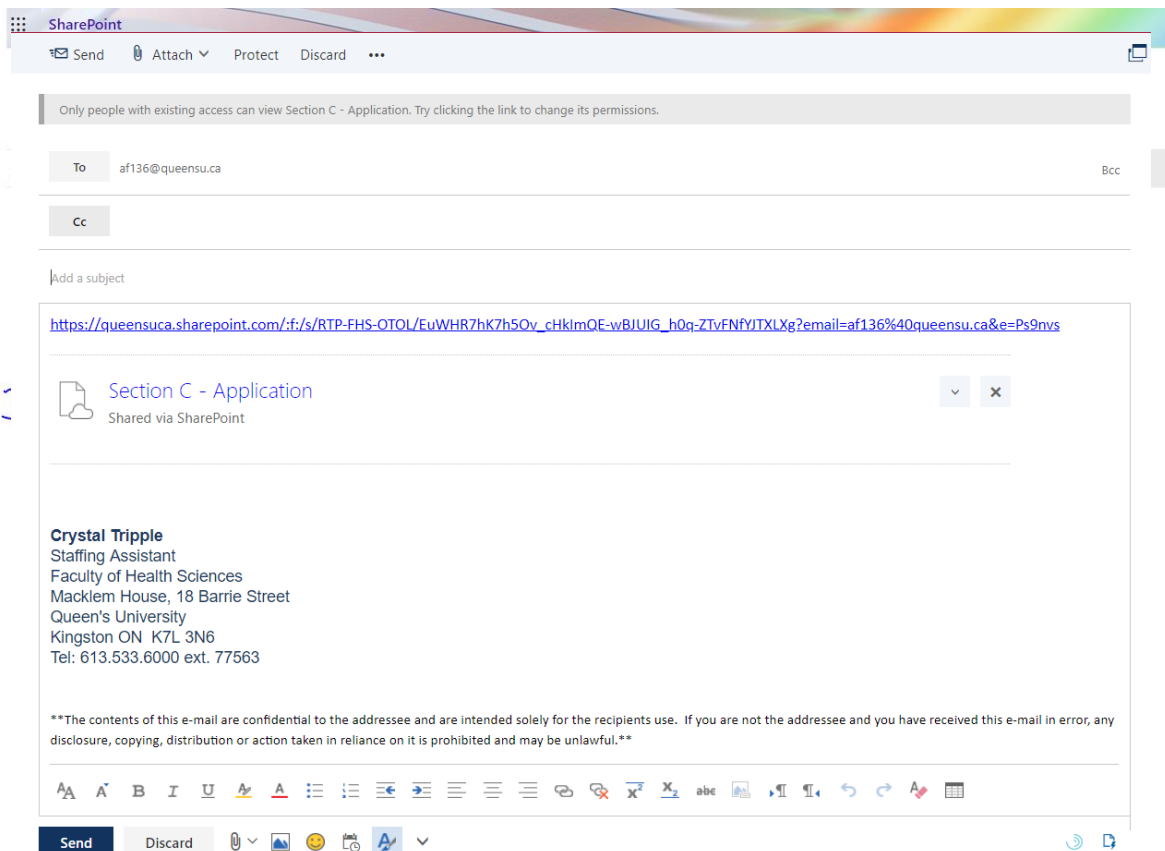


- **Referees – Granting access**

- You will have to send referees the link one at a time to ensure they are anonymous. If you add all of the e-mail addresses at once everyone who is sent the link will be able to see each other.

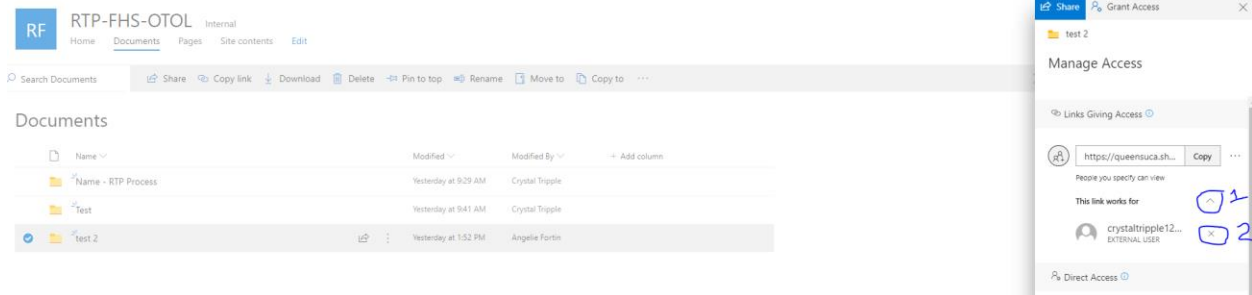
SharePoint - Updated August 2020

- Go to the folder or file you want to share and click the circle on the left side of the name. Then click “Share”. The access is default to only allow them to view the documents.
 - As per Article 30.8.11 in the collective agreement Referees should only be gaining access to:
 - Candidates full curriculum vitae
 - Teaching dossier
 - Scholarly work
- Enter the individuals email.
- **Click the Outlook button.** This will bring you to the web browser version of Outlook and an email will be generated (second picture below). Add a subject and a message to the referee.
 - If you do not click the Outlook button and send the message directly from SharePoint the email will go into the referee’s junk mail.
 - We recommend that you always send the email through Outlook to prevent the message from going to junk mail/spam as well as it provides a more professional appearance.
 - Please remind referees that once they open the link they will be sent a verification code to their email that they have to type in. This code lasts only 15 minutes and is usually sent to spam/junk mail.
- You must do the above for each referee, the link that is generated is specific to the email address you enter into SharePoint.



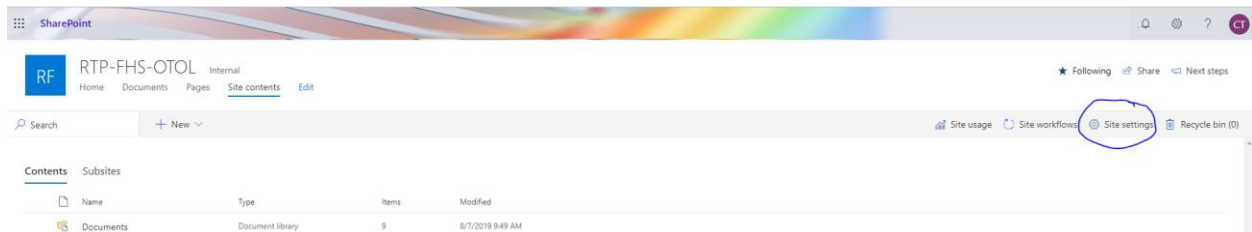
- **Referees – Removing access**

- If you made a new folder for referees all you have to do is delete the folder.
- To remove access to the links given, you will want to click the circle beside the folder/file name, it should turn blue with a white check mark, then go to “Manage access”.
- Under “Links Giving Access” you will want to click the downward facing arrow, then the list of people with access will appear.
- Click the ‘x’ beside the individual’s name you want to remove access to. A pop up will appear, click remove.
- Access is now removed.

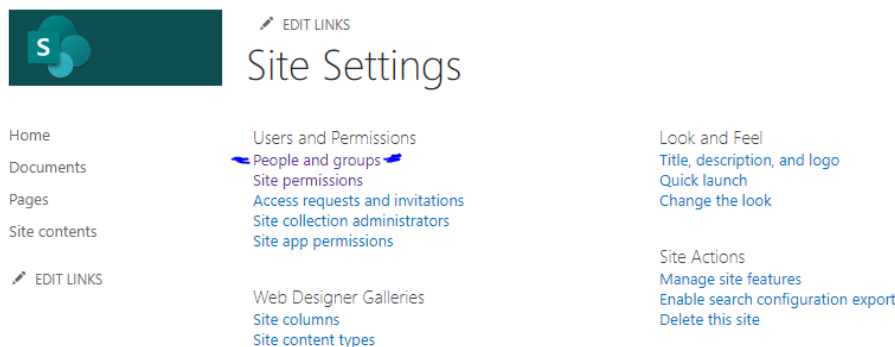


- **Committee Member Access to the RTP Site**

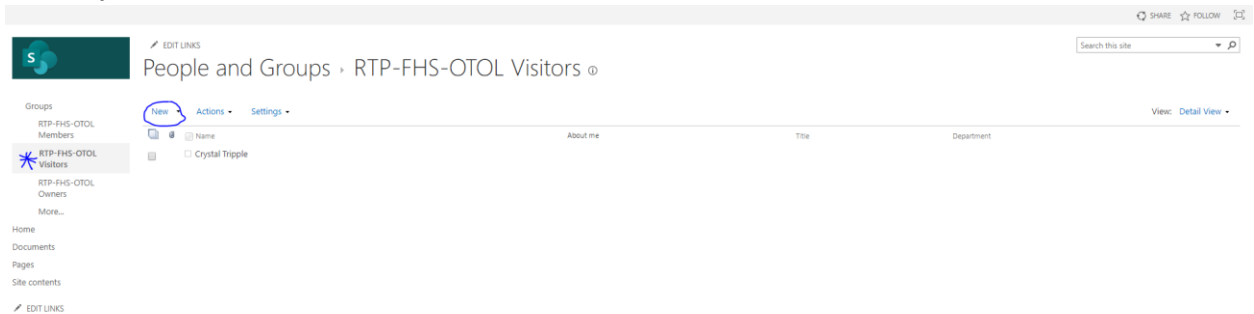
- Do once the committee needs access.
- To grant the committee access to the whole site go to “Site Contents” Then click on “site settings”. This will give them view access to the ENTIRE site and this access needs to be removed before the file is given to the Department head.



- Under “Users and Permission” click on “People and Groups”



- Then click on the RTP-FHS-‘department name’ – Visitors. Then click “New” and add all of the emails (must be Queen’s emails). Add in a message. If you click “Show Options” it will default to sending an e-mail invitation. If you are ready to give the committee access just click “Share”.



- **Before the folder is given to the Department head the committees access needs to be removed.** To do this go to the group, click the box beside the names of the people you want to remove access. Then click “Actions”. Then “Remove User from Group”.

