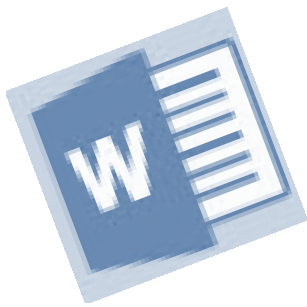
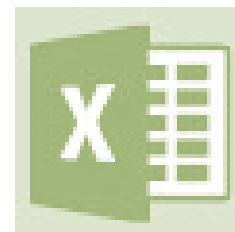


Staff IT Skills Sessions



IT ESSENTIALS – Working with Your Office 365 Sites For Site Owners (ST663b)



June 2016

Book online at:
Royalholloway.ac.uk/it/training
Self-Study packs also available



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Working with Your Office 365 Sites For Site Owners

- 1. How Do I Know whether I am a Site Owner?..... 3
- 2. Using and setting permissions overview 3
- 3. Changing a user’s permissions level 4
- 4. How to add an App to your Site..... 8
- 5. Displaying an App on a Site’s Page 8
- 6. Deleting unwanted Apps from a page 9
- 7. Managing the left-hand menu 9

Areas Specific to Site Owners

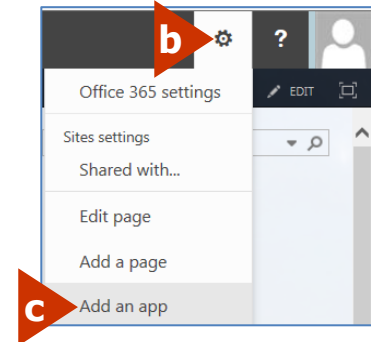
1. How Do I Know whether I am a Site Owner?

In addition to being able to use all of the features that Contributor Site members can use, Site Owners are able to:

- Make other users a Site Owner
- Add and remove Apps from their Site, e.g. additional Libraries and Announcements

The easiest way to identify if you are a Site Owner is to look for the **Add an app** option within the **Settings** menu:

- a. Ensure you are viewing the Site that you wish to check whether you are a Site Owner
- b. Click on the **Settings** button (cog) at the top-right of the screen to display the **Settings** menu
- c. If the **Add an app** option displays you **are** a Site Owner



2. Using and setting permissions overview

Site-level permissions can be set to one of three levels:

Owners:	<ul style="list-style-type: none">• Can set permissions for any other user, including to make them an Owner• Create, modify, and view any content within the Site• Can change the Site's appearance, including adding libraries and apps
Members:	Can Create, modify, and view ANY content within the Site They can also give Member and Visitor level permissions (but not Owner level)
Visitors:	Can view but not change any content within the Site Visitors are unable to change the permission level for any Site content

When dealing with permissions the following should be remembered:

- a. Anyone who has been given **Site-level** permissions will automatically have 'that' level of permissions for **all** Libraries, folders and files within the Site
- b. This is because permission levels are **inherited** by all items below it, i.e. setting a user's Site permission to be a Member means they have that level of permissions for all Libraries, folders, sub-folders, and files within the Site
- c. In a similar way, giving a user **local-level** permission for a particular folder results in 'that' permission level existing for all sub-folders and files within that folder
- d. Users with **Site-level** permissions **cannot** have their permissions for a **specific** folder or file removed, as trying to do so will remove their **Site-level** permissions
- e. It is therefore wise to give **Site-level** permission to **only** those you want to **always** have permissions for every Library, folder and file within the Site
For **all other** users set their permissions at a **local-level**, e.g. on the relevant folder, or file
- f. Take care when setting permissions as it is possible to override Site-level permissions with those at local-level
E.g. Site-level permissions set to Visitor but a particular folder set to Can edit, thus enabling the user to make changes to 'that' particular folder/file

3. Changing a user's permissions level

When changing the permission level for a user whom already has access to the Site, e.g. change a Member to be an Owner, you need to complete two steps:

Step 1: Remove the user's current level of permissions

Step 2: Set the user's permissions level that they are now to have

If you need to totally remove a user's access to the Site, e.g. for those leaving the College, only **Step 1** of the **Changing Site-level permissions** section needs to be completed

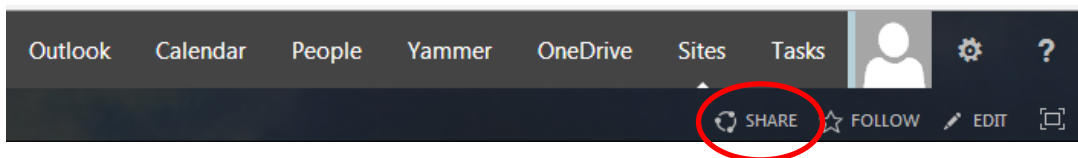
Note: When modifying (rather than totally removing) permissions, any links the user already has to the Site, e.g. e-mailed links or a followed link on their Site's Homepage are not affected, and so stay operational.

Changing *Site-level* permissions

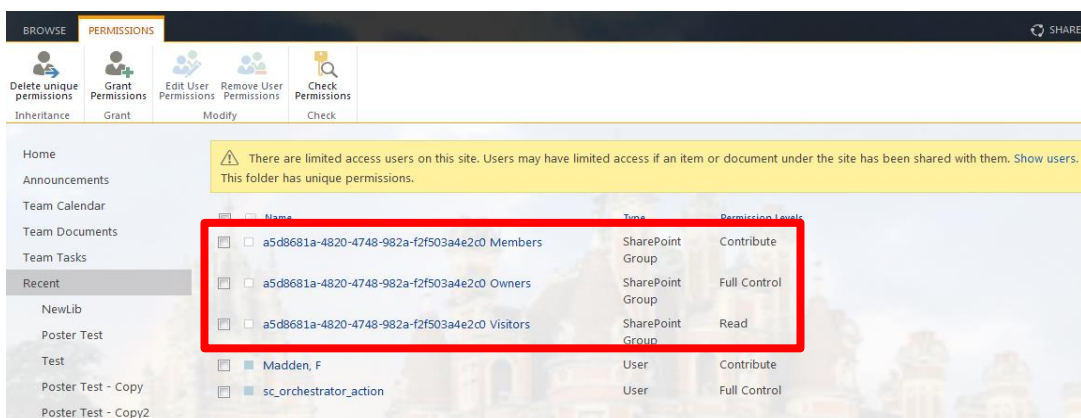
Step 1: Removing current *Site-level* permissions:

Note: These instructions are applicable where the permissions have been set at **Site-level**

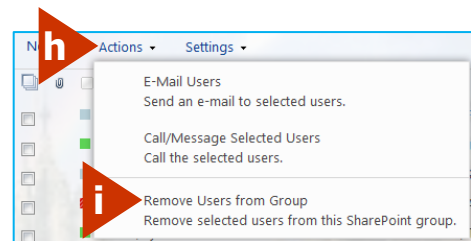
- a. Click **SHARE** at the top-right of the window to display the **Share...** dialogue box



- b. Ensure **Shared with** is selected in the left-hand panel
c. Click on **ADVANCED** at the bottom of the dialogue box
d. A window displays showing a list of the permissions available (Owners, Members, Visitors)

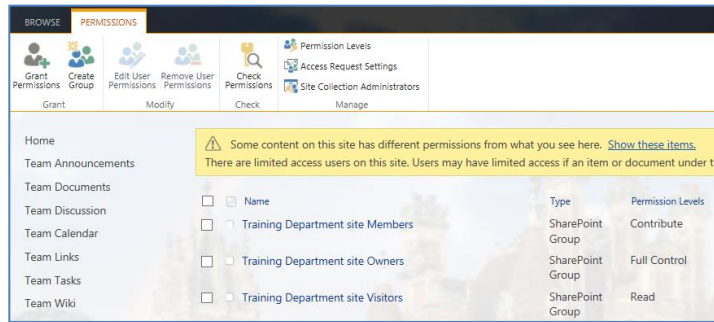


- e. Click on the link that displays the permission level that the user currently has i.e. **Owners, Members, or Visitors**
f. A window displays showing all those with 'that' level of permission
g. Click on the check box to the left of the user to be removed so that it displays a tick mark
h. Click on the **Actions** option immediately above the **Name** heading
i. Click on **Remove Users from Group**
j. When the dialogue box displays stating that **You are about to remove the following members from the group** click **OK** to remove the permissions and close the dialogue box

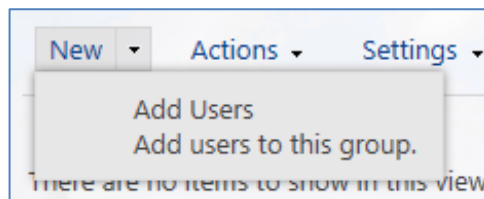


Step 2: Applying the permissions level the user is to now have:

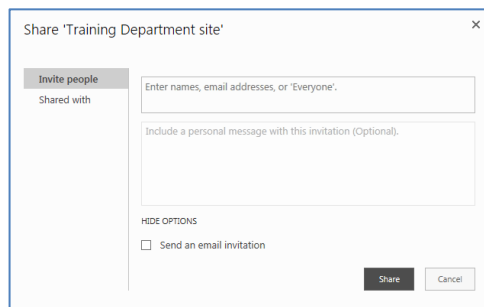
- a. Click on the browser’s **Back** arrow to re-display the list of permissions available (Owners, Members, Visitors)



- b. Click on the link that displays the level of permission the user is to now be given (Owners, Members, Visitors)
- c. Click on the down-arrow to the right of the **New** option above the **Name** heading



- d. Select **Add Users**
- e. In the **Share...** dialogue box that displays, ensure **Invite people** is selected in the left-hand panel



- f. In the top text box:
If you are giving access to members of the College:
 enter their complete College e-mail address **or** family name
 Then from the list that displays below the text box select the user for whom the permissions are to be set so that their correct details display in the text box

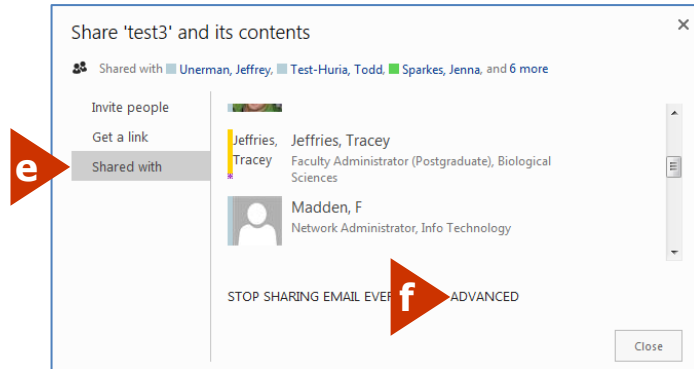
If you are giving access to non-members of the College:
 Accurately enter the user’s e-mail address
- g. If **SHOW OPTIONS** displays below the centre text box click on it to display the **Send an email invitation** check box
- h. As the user already has access to the Site it is probably unnecessary to send an e-mail containing a link to the Site
 If that is the case ensure that the checkbox to the left of **Send an email invitation** does **not** display a tick mark
- i. Click **Share** to enable the permissions
- j. Click **Home** in the left-hand menu to return to the Site’s main page

Changing *Local-level* permissions

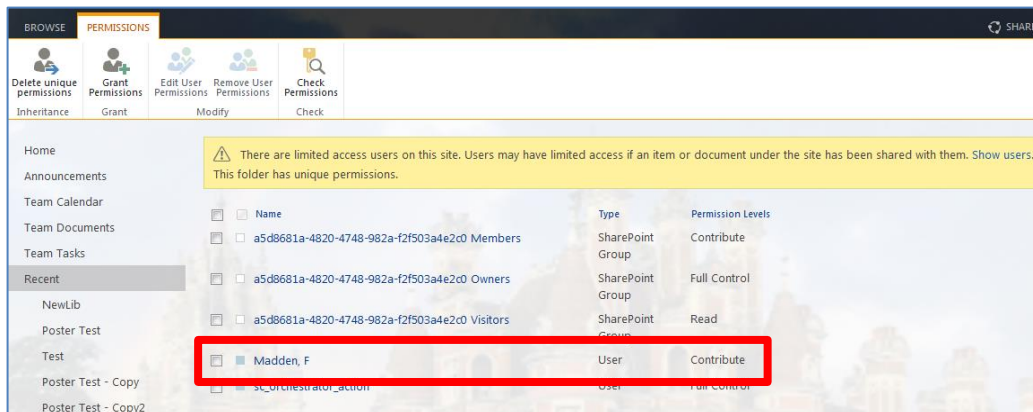
Step 1: Removing current *Local-level* permissions:

Note: These instructions are applicable where the permissions have been set at Local-level on Libraries, folders, subfolders, or files

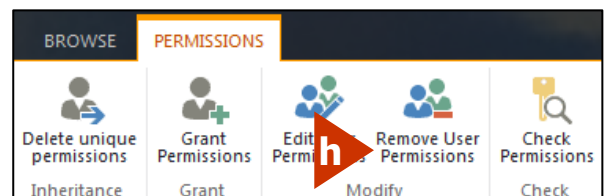
- Ensure that the **Documents** heading is displaying towards the top of the screen
- Also ensure that the folder or file **name** whose local permissions is to be changed is displaying
- Click on the **ellipses** button (three dots) at the right of the folder or file name
- Click **SHARE** at the bottom of the dialogue box that displays
- In the **Share...** dialogue box that displays, ensure **Shared with** is selected in the left-hand panel



- Click on **ADVANCED** towards the bottom of the dialogue box
 - A window displays showing a list of the Site-level permissions available (Owners, Members, Visitors), and below that a list of users who have **local-level** permissions
- Note:** Do not change the **sc_orchestrator_action** option, as this is required by the system

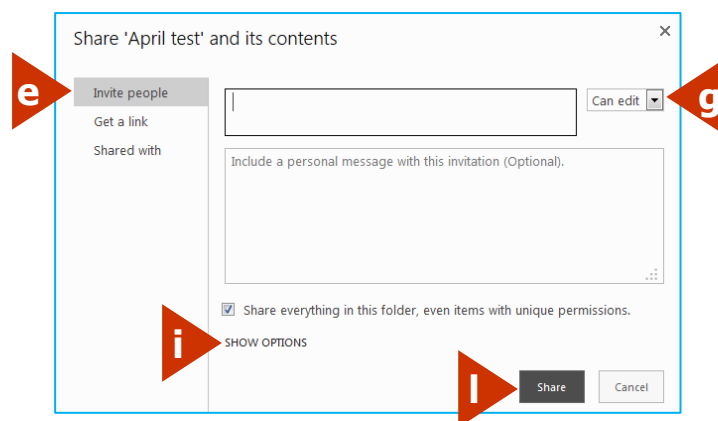


- In the lower part of the list click on the check box to the left of the user to be removed so that it displays a tick mark
- Click on **Remove User Permissions** in the **Modify** group at the right of the short **Ribbon** that displays
- When the dialogue box displays stating that you are **about to remove all permissions for the user** click **OK**
- Click **Home** in the left-hand menu to return to the Site's main page



Step 2: Applying the *Local-level* permissions the user is to now have

- a. Ensure that the **Documents** heading is displaying towards the top of the screen
- b. Also ensure that the folder or file **name** whose local permissions is to be changed is displaying
- c. Click on the **ellipses** button (three dots) at the right of the folder or file name
- d. Click **SHARE** at the bottom of the dialogue box that displays
- e. In the **Share...** dialogue box that displays, ensure **Invite people** is selected in the left-hand panel



- f. In the top text box:
If you are giving access to members of the College:
Enter their complete College e-mail address **or** family name
Then from the list that displays below the text box select the user for whom the permissions are to be set so that their correct details display in the text box

If you are giving access to non-members of the College:
Enter each user's **complete** and **accurate** e-mail address
- g. Click on the down-arrow to the right of the names text box
- h. Select **Can edit** or **Can view** as appropriate to set the user's permission level
- i. If **SHOW OPTIONS** displays below the lower text box click on it
- j. If an e-mail containing a link to the Site is to be sent to those receiving permissions ensure the **Send an e-mail invitation** check box displays a tick mark
- k. If an e-mail is to be sent, in the lower text box enter a suitable e-mail message
Note: Sending an e-mail is especially important for external users, as it is how they receive the link to the Site. Also, this link will expire after 7 days if they have not clicked on it within that time
- l. Click **Share** to instigate the share permissions
In addition to receiving the e-mail (if sent), members of College will have a link to the document added to the **Shared with me** folder on their **OneDrive**

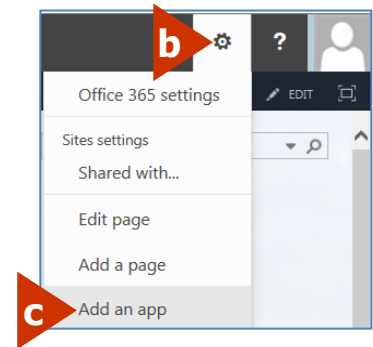
4. How to add an App to your Site

The Office 365 Sites apps are small stand-alone applications that perform specific tasks which you can add to your Site as and when needed

For example, the Library app provides you with an additional Library in which you can store files that you wish to keep separate from the Site's main Library

To add an app the left-hand menu:

- a. Ensure you are viewing the Office 365 Site that you wish to add the app to
- b. Click on the **Settings** button (cog) at the top-right of the screen to display the **Settings** menu
- c. Click on the **Add an app** option
- d. From the list of options that display click on the app you wish to add to your Site
- e. In the **Name:** panel that displays add an appropriate name for the app
- f. Click on **Create** to add the app to below the **Recent** heading in the menu at the left of your Site



Remember: Multiple copies of an app can be added to your Site

5. Displaying an App on a Site's Page

When an app is added to a Site it can be accessed only from the left-hand menu

To make an app included on the left-hand menu display on one of the Site's pages:

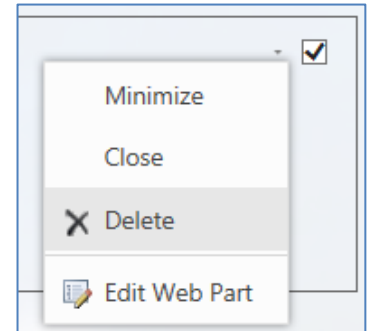
- a. Ensure the app to be added to the page is displayed within the left-hand menu (see previous Section)
- b. Ensure that the page on which the app is to be added to (e.g. the Home or Documents page) is displaying
- c. Click on the **Settings** button (cog) at the top-right of the screen to display the **Settings** menu
- d. Click on the **Edit page** option



- e. Click on the **Insert** tab towards the top-left of the window
- f. Click on the page to position the insertion point where the app is to be inserted
- g. Click on the **App Part** button in the **Parts** group towards the right of the short **Ribbon** that displays
- h. A panel displays at the top of the window showing the Apps available
- i. Under the **Parts** heading at the left of the panel click on the app to be added to the page
- j. At the lower right of the panel click on **Add** to add the app to the page
- k. View the page to ensure it appears as you wish
- l. Click on **Home** in the left-hand menu
- m. If a dialogue box displays asking whether the changes should be saved click on **OK** if you wish to keep the app on the page
Alternatively, click on **Cancel** to revert to how the page appeared previously

6. Deleting unwanted Apps from a page

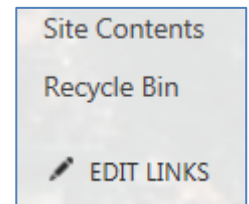
- Ensure that the page from which the app is to be removed is displaying
- Click on the **Settings** button (cog) at the top-right of the screen to display the **Settings** menu
- Click on the **Edit page** option
- Point anywhere within the app to display a checkbox and small black down-arrow at the top right of the app
- Click on the small black down-arrow to display a menu
- Click on **Delete** to remove the app from the page
- When the dialogue box displays stating that **You are about to permanently delete this Web Part** click **OK** to delete it or **Cancel** to keep it in place



7. Managing the left-hand menu

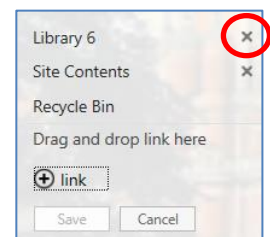
To rename menu links (headings)

- Click on **EDIT LINKS** at the bottom of the menu to display it in editing mode
- Click on the link (heading) that is to be renamed so that its text becomes highlighted
- If only part of the text is to be changed, click and drag across the part to be changed so that it is selected
- Type the text change so that the link (heading) displays with its updated name
- Click away from the link to de-select it
- Click on **Save** at the bottom of the menu to save the change and remove the menu from editing mode



To remove unwanted links (headings) from the menu

- Click on **EDIT LINKS** at the bottom of the left-hand menu to display it in editing mode
- Delete the link (heading) that is to be removed by clicking on the **X** to its right
- Click on **Save** at the bottom of the menu to save the change and remove the menu from editing mode



To move links (headings) within the menu

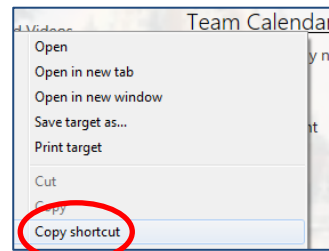
- Click on **EDIT LINKS** at the bottom of the left-hand menu to display it in editing mode
- Click on the link to be moved
- With the mouse button still depressed drag the link to the required position within the menu
- Release the mouse button to drop the link into 'that' position
- Click on **Save** at the bottom of the menu to save the change and remove the menu from editing mode

To restore a deleted link (heading) to an app on a page

If a link to an app on one of the Site's pages is accidentally removed from the menu (e.g. for the Calendar) it can be restored by creating a new link to the app
This involves first copying the app's URL and then inserting this into a newly created link

To copy the app's URL

- a. Locate the app on the Site's page
- b. Right-click on the app's heading (e.g. Calendar)
- c. From the menu that displays:
If using **Internet Explorer** select **Copy shortcut**
If using **Firefox** select **Copy Link Location**
If using **Chrome** select **Copy link address**



To create the new link

- d. Click on **EDIT LINKS** at the bottom of the left-hand menu to display it in editing mode
- e. Click **Link** towards the bottom of the menu to display the **Add a link** dialogue box
- f. In the **Text to display** panel enter the heading to display in the menu
- g. To Paste in the previously copied URL right-click in the **Address** panel and select **Paste** from the menu that displays
- h. Click **OK** to close the dialogue box and create the link in the menu
- i. Click on **Save** at the bottom of the menu to save the change and remove the menu from editing mode

