Document Management Platform – Basic User Guide for GC Drive & GC Collaborate

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What is GC Drive?
GC Drive (Powered by SharePoint) enables individuals to better organize content, share work, and take information with them wherever they go in a secure environment. GC Drive is accessible from any device both locally within the Graduate Center and remotely. All you need is a web browser, such as Microsoft Edge, Internet Explorer, Chrome, or Firefox. Please use your GC network username and password to login.

Access GC Drive
Login:
1. Go to the CUNY Graduate Center Home Page (www.gc.cuny.edu).
2. Click the GC Portal link at the top page
3. Select and Click the “GC Drive”
4. Please use your GC credential to login.

Please Note: You can access through a mobile device by entering in the entire link at the web browser and use your GC credentials to login. Link is https://gcdrive.gc.cuny.edu

Navigate GC Drive

- **App Launcher**
  The app launcher helps you get to your apps from anywhere in SharePoint. Use the app launcher to quickly launch an application, browse sites, and access your files. When you click (or tap) the app launcher icon  , you get a menu of apps and services as shown here.

By default, the App Launcher includes the following resources:

- **Newsfeed**: The Newsfeed option, when clicked, will navigate to the MySite Newsfeed page.
• **OneDrive**: The OneDrive option navigates to the Documents library used for OneDrive for Business. This library will either be located in the user’s local SharePoint MySite.

• **Sites**: The Sites option navigates to the Sites page showing sites the user is currently following and sites suggested for following. The sites option is also listed in the global navigation along with the App Launcher and provides an alternate access method to get to the sites page.

❖ **User Menu**
The User menu is located in the right banner area in the default layout of the SharePoint 2016 environment. The User menu provides access to the user’s details, as well as the ability to sign out of SharePoint, as shown.

❖ **Settings Menu**
The Settings menu is located to the left of the User Menu in the banner area. It is also known as a “gear” like icon. Clicking the gear icon, displays a dynamic drop down menu based on available site-management options to logged-on users as well as their rights within the site.

❖ **Quick Launch**
Located in the left section of the site, the Quick Launch navigation area provides easy access to elements that are available within the site. The Quick Launch navigation options can be managed to include links to lists, libraries, subsites, and custom URLs. By default, the Quick Launch navigation includes links to the current site’s home page and Site Contents page. Sites created from the various site templates include references to key site resources in the Quick Launch by default as well.

❖ **Ribbon**
The ribbon includes the contextual page management options available to you. Initially the ribbon displays the ribbon tabs, with the related options presented once a tab is selected.

**View and Edit My Profile**
1. Hover your name from the User Menu and click the dropdown to select “About Me:
2. About Me navigates you to the MySite About Me page. This page allows you to manage your profile details and view your activities. You can edit your profile on this page.

**OneDrive for Business**

**What is OneDrive for Business**
The OneDrive option navigates to the Documents library used for OneDrive for Business. OneDrive for Business is a personal document library for storing files in SharePoint and files you want to share with
only select people within the Graduate Center. To access OneDrive for Business, click the OneDrive option from the App Launcher.

**Sync with OneDrive for Business**

Since SharePoint sites can be synchronized with your local computer, you can access information even without a connection to the SharePoint environment. SharePoint libraries are synchronized locally using OneDrive for Business. OneDrive for Business lets you synchronize documents library content with your local computer and makes it accessible within your local file system.

To keep the content current, it is important that you’re still connected to SharePoint environment. Or, you can also re-sync the information back to SharePoint when you’re ready to post and share with others.

**Steps to sync with One Drive for Business (PC Users)**

1. Click on and a dialog box appears to sync the documents library.

2. Once you click “Sync Now,” it may ask to re-authenticate by logging back in. If so, please do it. **ATTENTION**: If working remotely and want to sync, please be sure to use “GC\(\text{username}\)” if it asks to re-authenticate.

3. Then, it takes you on this page below. On this page, you can select where you want the documents to be saved. By default, it will save on your desktop with the SharePoint logo folder.
4. Click “Sync Now” again, and this will start sync’ing as shown here. **Please Note:** depending on your browser, it’s possible that you may be prompted to re-authenticate by logging back in. If so, please do it.

5. Once it’s finish sync’ing, you can click on “show my files” to see where it is stored on your computer.

6. On your computer, it will open in this format. It has the SharePoint logo. Double click the OneDrive for Business folder to see list of the documents.

7. To manage your synchronization, you can go to your computer setting to pause or stop synchronization. On your pc’s task bar, lower right corner, hover over the carrot to...
display the hidden icons. Right click on the One Drive icon to display the menu items. See below snapshots.

If you have a Mac, please refer to the “Get started with the new OneDrive sync client on Mac OS X.”

Upload, Open/Read, Edit, and Save Document

Add/Upload Document(s)
Click on the App Launcher on the left side as seen above and select One Drive. This brings you to the Documents page or click Documents on top left menu to display page.

Go to the document library view page as seen here and click on “upload.” You can attach multiple files at once, attach zip files, and any types of files from Word, Excel, images, and videos.
You can drag and drop documents from your computer to SharePoint as seen below.

1. Highlight the file(s) from your computer
2. With your mouse, drag them over to SharePoint and release your mouse.
3. SharePoint will start uploading these files to document library view page.

Open, Read, Edit, and Save Document
To open and edit a file, do the following.
1. Select the file you want to open and click on it.
2. Another way is to check off the file name and click on the panel (…) and select “open” as seen below.
3. After you click “open,” the file document will open as a Word document, Excel, document, etc.
4. Click on “edit document” or “enable editing” at the top of the file as seen below. For Mac users, you may get similar message to click “edit” first before making changes to the document.

5. Make the change and click Save
6. Your updated document is now saved in SharePoint. You can reopen to validate.

**WARNING:** When trying to edit and save files remotely, please be sure to resync the document. You may require to re-authenticate during saving your files. If so, be sure to use “GC\(username)" and GC password.

### Checking Documents Out and In

When you plan to make edits and want to prevent others from editing the document until you are done with your edits, you can “check out” the file. Checking out the file prevents others from editing the file until it is checked back in. Individuals visiting a library can see whether files are checked out and to whom.

**To check out a document/file, please do the following:**
1. Navigate to the documents library view page where the files are stored
2. Select the file you want to check out
3. From the document’s hover panel menu, select the Check Out option from the ellipse’s Advanced submenu.
The document is checked out to the current user. The library view page will refresh and you’ll see an icon next to the file name that looks like this and if you hover it, it will say “check out.”

If you want to check out more than one document, follow step 1 and 2 as mentioned above. For step 3, select More from the view page as seen below and click “check-out”.

Check - In:
Documents checked out are later checked back into a library using the same approach discussed for checking items out. The only exception being that the “Check In” option is used instead of the Check Out option. You will be prompted with this box and confirm to check in. You need to leave it as NO to check back in and click OK.

Sharing Content

Share single document
To share a specific document, click on the file like the one listed below and click “share.” A similar box appears that allows you to share and send an invitation.

Steps to share single document:
1. Highlight the file you want to share
2. Click on “share” right above the view as seen below.
3. Then, you get this box to share your document. Fill out the info and share.
Sharing with Me
Share with Me is located at the Quick Launch menu. It provides info as to how many documents, you’ve shared. Click on “Share with Me and you’ll get your list of files shared as seen below.

Share your entire site

1. To share your entire site, click on “share” on top right banner as seen here. If you hover it, it informs you that you will give people access to this site.
2. Once you click Share, it brings up a box like this below.
Share your library for all your documents

1. To share documents library, click on the “library “from ribbon tab and select “share with.” It will give access to share all your documents on this library.

2. It takes you to this window below where you enter in the members you want to invite, send them a description, and grant them permission to all your documents on that library.
Email Notification

Whether you’re sharing your library page, site, or single/multiple documents, the recipient will receive similar email notification like the one below on his/her inbox.

Document Library

The document library is the most general-purpose and commonly used type of library in SharePoint. Document libraries can store documents that need to be managed, edited, and shared within SharePoint. When created document libraries contain only a single metadata column, which is used to store the document’s title.

Creating New Document Library

1. Select “Site Content” from the Quick Launch or setting menu that has an icon. Select “Site Content.”
2. Click on “add an app.” And select “Document Library” app.

3. Once you select an App, it will prompt to title the app. Click Create

4. It takes you back to the Site Content window. It will display the new App created as seen here for “Resource.” Click on “Resource” to open the new library.
Create and Manage Alerts

When you create an alert, you define its characteristics, including the types of changes that will trigger the alert and its frequency of notification. Several types of changes can be identified that can trigger an alert to be sent. They are dependent on the type of object the alert is created for. When the alerts are configured, the frequency for receiving the alerts are also identified. There are several options available for determining when notifications are sent to the individuals the alert is configured for. The following frequencies can be defined for the various types of alerts.

- Send Notification Immediately: Specifies that the alert notification is to be sent when the alert is triggered. This option is available for all types of alerts except search alerts.
- Send a Daily Summary: Specifies that all activities that trigger the alert are compiled into a daily summary report and sent to the identified individuals once a day at the time specified when the alert was created.
- Send Weekly Summary: Identifies that activities triggering the alert are compiled into a weekly summary report sent to the identified individuals once a week on a day and at a time specified when the alert was created.

Creating List Item and Document Alerts
Alerts created for a specific list item or document send notifications for changes to that item. To create an alert for a specific list item or document, do the following:

1. Navigate to the list or library containing the item for which you want to create the alert.
2. On the list or library view page, check the check box next to the list item or document to create the alert against, and choose the “Set Alert on This document” option from the Alert Me drop-down menu on the Items/Files ribbon tab.
3. It will take you the New Alert Window. Do the following:

   a. **Alert Title section** - optionally change the default title given to the new alert. The default title is listed as a colon-separated combination of the list or library name followed by the item name.

   b. **Send Alert To section** - site managers can update the list of individuals to be alerted allowing them to include others. Other individuals can create alerts only for themselves in the site.

   c. **Delivery Method section** - specify whether to send the alert via e-mail or text message. The text message option is only selectable if a SharePoint technical administrator configures the environment for SMS (text messages). To send an alert via text message, specify the SMS number and whether to send the item’s URL as part of the message.

   d. **Send Alerts for These Changes section** - identify what changes to the item will trigger the alert. Options are as follows:

      • Anything Changes: Triggers the alert when any change is made to the item.
      • Someone Else Changes a Document: Triggers the alert when someone other than the alerted user makes a change to the item.
      • Someone Else Changes a Document Created by Me: Triggers the alert only if the item was created by the alerted user and only when someone other than that user changes it.
      • Someone Else Changes a Document Last Modified by Me: Triggers the alert only if the item was last modified by the alerted user and only when someone other than that user changes the item.

   e. In the **When to Send Alerts section**, identify how frequently to send the alert notifications. Select from these options:

      i. Send Notification Immediately
      ii. Send a Daily Summary
      iii. Send a Weekly Summary

   f. Click the OK button. The alert is created, and you are returned to the list or library view.

4. You will receive an email alert confirmation as seen below.
5. Below is an example of an alert notification of a document changed.

Check Your Alerts
Now, you can also check your newly created alert by clicking on “Manage My Alert” option from “Alert Me”. On this screen, you can add a new alert as well as delete any existing alerts.

Grant and Manage Permissions

From the , select “Site Setting.” Click Site Permissions. You can setup permissions for Teamsite members, Teamsite owner, and Teamsite visitors.
To find out the permission level and description, go to the ribbon tab and select “permission level.”

- Full control – has full control
- Design - can view, add, update, delete, approve, and customize
- Edit – Can add, edit, and delete lists; can view, add, update, and delete list items and documents
- Contribute – can view, add, update, and delete list items and documents
- Read – can view pages and list items and download documents
- Limited access – can view specific lists, document libraries, list items, folders, or documents who given permissions
- View only – can view pages, list items, and documents. document types with server-side file handlers can be viewed in the browser but not downloaded

**Adding Permission Levels**

Additional permission levels can be created when you need a customized set of security rights. For example, you may want to give users the ability to create and edit content in a site or specific library but not delete anything, or you may want to give someone the ability to add information but not edit or delete it.
To create a new permission level, do the following:

1. Navigate to a site with unique permissions and where you are the administrator.
2. On the site’s home page, select Site Settings from the Settings menu.
3. On the Site Settings page, select the Site Permissions option from the Users and Permissions section.
4. On the Permissions page, select the Permission Levels option from the Permissions ribbon tab.
5. On the Permission Levels page, click the Add a Permission Level link.
6. On the Add a Permission Level page, enter the following:
   a) In the Name and Description section, enter the name of the new permission level. You can also enter an optional description. The description is presented next to the name when the permission level is listed for selection.
   b) In the Permissions section, check the boxes for all permissions that the new permission level should include. Choose the Select All option to add all the listed permissions.
   c) Once all of the necessary information has been entered, click the Create button.

**Check Permission**
If you want to check a member’s permission, just click “Check Permission” from the ribbon and a dialog box appears. Type in the member’s name and it will extract all info as what kind of permissions he/she has.

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**Create Group Permissions**
SharePoint groups are used to combine user and group accounts to make security assignment easier. User and group accounts will be assigned to SharePoint groups, and the SharePoint groups are then used to assign rights within sites. SharePoint groups can be used to assign rights to lists and libraries contained within the site. By default, when a new root site is created, a set of default SharePoint groups is also created.

To create new SharePoint groups within SharePoint, do as follows:
1. Navigate to the site in which the group will be used.
2. On the site’s home page, select the Site Settings option from the Settings menu.
3. On the Site Settings page, click the Site Permissions option from the Users and Permissions section.
4. On the Permissions page, select the Create Group command from the Permissions ribbon tab seen below.

5. On the Create Group page, enter the following:
   
   a) In the Name and About Me Description section, enter the name for the new SharePoint group. You can also enter an optional About Me description. The About Me information is presented next to the name when the SharePoint group is presented.
   
   b) If necessary, in the Owner section, update the group owner information. The owner has the right to update the site’s group information. The owner defaults to the user creating the SharePoint group.
   
   c) In the Group Settings section, specify whether only group members or everyone has the ability to view group membership information. You can also define whether only the group owner or all group members can add and remove group members.
   
   d) In the Membership Requests section, specify whether users can request to join or leave the group and whether requests are to be automatically accepted. The e-mail address that requests should be sent to is also listed. This address can be changed when the Auto-Accept Requests option is set to No. By default, the e-mail address will be set as the e-mail address of the user creating the group.
   
   e) If the current site does not inherit permissions from its parent, in the Give Group Permission to this Site section, select the permission level, if any, to grant the group in the current site.
   
   f) Once all of the necessary information has been entered, click the Create button.

6. Below is an example of “NYC Team Contributors.”

   ![Image of a group page]

**Add Permission to Users**

Two ways to add users to a group.
1. Open an existing group as listed below and select “new” and add new user to the group. You will be prompted to invite a member and provide a comment to welcome them to the group. By default, an email invitation will be sent to the new member. You can uncheck if you don’t want to send an invite.

2. Second option is to use “Grant Permissions” by clicking on top ribbon. From there, you’re prompted with a box to enter in the member you want to grant, and select which existing group you want it apply it to.
Remove or delete User Permissions
If one of your members no longer need permission to your site, document, or library, you can either select the member from the document and remove the permission.

1. Click on the user, click “action” dropdown, and select “remove user from Group.”
2. You will get an alert to confirm that you want to remove user from the group. Click OK.
3. The member will no longer be a member of this document, library, or site you specific.

Search Services
SharePoint search offers a rich interface that allows you to search for and locate information, based on its content and associated properties. Results can then be refined and reviewed to isolate the desired materials. These interfaces support searches in the overall environment or specific sites, lists, and libraries.
Performing search in Teamsite/site page
Searches can be initiated from any site page within SharePoint. Search box is at the top of the page to give you easy access to search services. The search interface either provides a standard search box, as seen below, or a search box with integrated options, which allow selection of verticals to use in targeting the search.

When you execute a search from the site’s search box, the scope will initially default to the current site, but you can expand it to search across the entire environment instead.

Performing search in list and library view
You can also initiate a search in list and library views. A search box is part of list and library view headers as seen below. Searches performed in a list or library view are scoped to return results just from the associated list or library.

Working with Search Results
Once a search is performed, search results are presented. The results returned for a search include items that meet the search criteria contained in the identified scope, that the user performing the search has rights to access. That is, search results will not include content that the searcher does not have at least read access to. The order of the results returned is determined by the items’ relevance, which is based on a variety of factors, including how closely the result meets the query, how active or current the item is, and how relevant the item is to the searcher. Presentation of results returned is
further defined by additional factors, including whether result blocks are defined and the result type definitions in use.