Microsoft SharePoint

Quick Manual for DeKalb County
Human Services Grant Program Applicants

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Overview

The purpose of the Human Services Grant Program is to provide opportunities for community partnership to local organizations that can successfully address identified needs of the citizens who live in DeKalb County, Georgia. The primary goal of the Human Services Grant Program is to provide resources to local non-profits that can be used to benefit DeKalb citizens. Our mission is to build and maintain sustainable communities and to improve public safety for all who live, work, and play in DeKalb.

The Human Services Grant Program is competitive, and the total amount of awards allotted each year is based on the availability of funds. Funding from this grant program is designed to supplement existing programs and activities.

In 2020, the Human Services Grant Program moved to an electronic process for the submission of grant applications. Applicants must access and utilize SharePoint to upload electronic copies of the completed grant application and supporting documents.

Microsoft SharePoint is a cloud-based service that helps organizations share and manage content, knowledge, and applications to:

- Empower Teamwork
- Quickly Find Information
- Seamlessly Collaborate Across Organizations

This document has been developed to provide you with instructions on how to utilize SharePoint during the submission of your 2021-2022 Human Services Grant Application.

Definitions

Microsoft has a defined list of content types that will be created on the Human Services SharePoint site. These types include, but are not limited to:

A Page – A page that is edited within the browser using the editor functionality in SharePoint. These pages primarily contain text, embed images, links, lists, and other apps within them. To manipulate them, the site administrator must give you edit permissions.

A Document Library – A document library uploads Word files and other files to share. These document libraries offer the ability to check files out to make sure that only one person edits them at any given time.

Other Kinds of Libraries – These are form libraries, which store XML forms through Microsoft InfoPath. This includes picture libraries, which just store image files and wiki page libraries.

A List – Lists are collections of like items such as: links, announcements, calendars, contacts, editable datasheet forms, discussion boards, issue tracking lists, tasks with a Gantt-like chart, surveys, or imported spreadsheets.

Beginning Steps

A Virtual Public Information Meeting held by the DeKalb Human Services Department starts the beginning of the annual Human Services Grant Application Cycle. All applicants are strongly encouraged to attend this meeting; however, attendance is not mandatory.

To obtain an electronic copy of the 2021-2022 Grant Application and to gain access to SharePoint, you must first notify the Human Services Grant Program staff of your interest in applying.

The Human Services Grant Reference Form is used to request the 2021-2022 Human Services Grant Application. To obtain the Human Services Grant Reference Form, please visit https://dekalbhumanservices.com/grants-2/

1. Complete the electronic reference form. This form will provide us with the names of no more than two (2) individuals from your organization who will be responsible for uploading the grant application.

2. Once the form has been completed, email the form to Lisa Thomas, Grants Coordinator at hsgrants@dekalbcountyga.gov.

3. Once the form is processed, the designated persons on the form will receive a system email from SharePoint with an invitation to access the Human Services SharePoint site.

   Below is an example of what this email will look like:
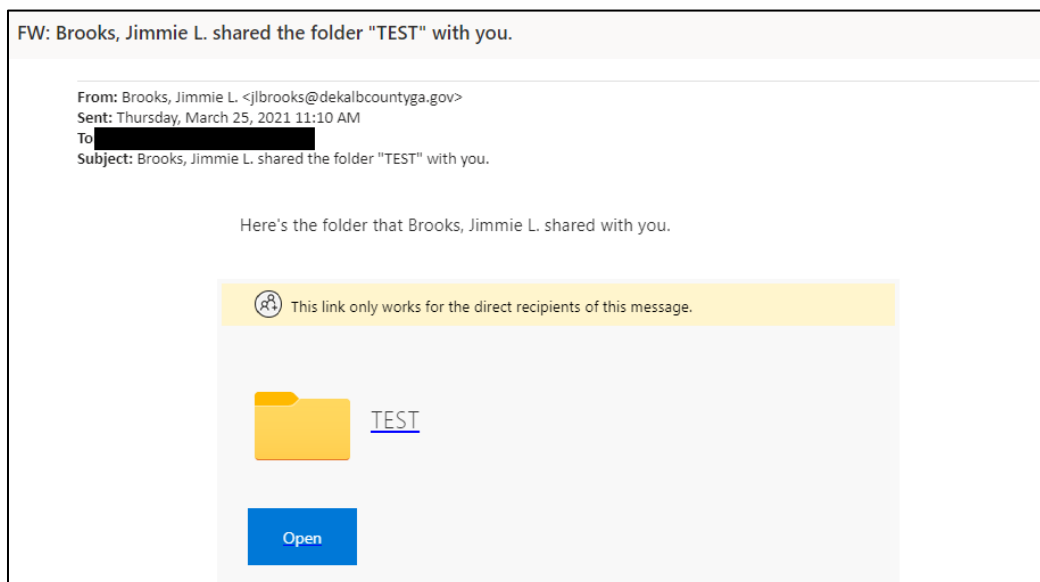
4. Click on the Open button within this email and SharePoint will automatically send you a second email with a verification code to gain full entry. This is done as a security measure to ensure this correct recipient will gain access with proper permissions.

An example of the second email is shown below:
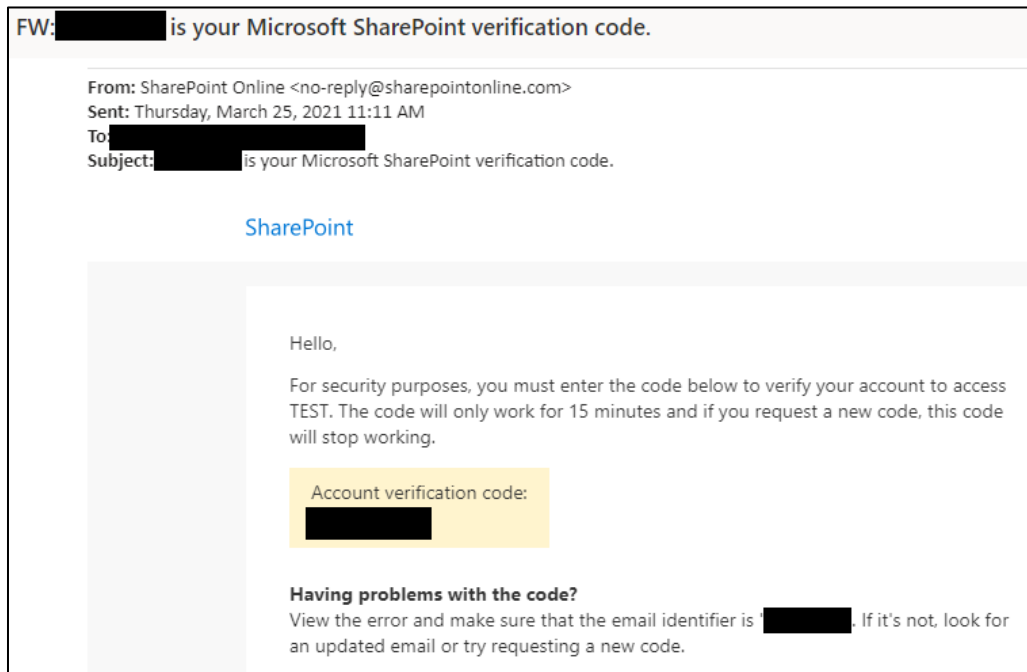
Please note that the verification email is timed for only 15 minutes for recipients to act. This time limit cannot be modified due to security reasons. Once it expires, and the verification task has not been completed, this specific access to the SharePoint site will be revoked and the site administrator will need to share the folder(s) again.

Beginning Steps Troubleshooting

1. **Can't find the invitation email from SharePoint**

   Check your junk/spam folder: The invitation email and the verification email are both system-generated emails from SharePoint. Due to this, many email platforms, such as Microsoft Outlook, will identify this mail as spam or junk and will store it in an individual's junk folder.

2. **Can't find the verification email from SharePoint**

   Check your junk/spam folder: If you have clicked the Open button in the invitation email and have not received this verification email within 2 to 3 minutes, please check your junk/spam folder to see if this message was stored there by your email platform.


If there is no email present in your inbox or junk/spam folder for either the invitation or the verification, contact the site administrator, Lisa Thomas, via email (hsgrants@dekalbcountyga.gov).

Sharing and Managing Documents

Upon entering your folder, you will find electronic copies of the 2021-2022 Grant Application and the 2021-2022 Grant Program Guidelines. The Grant Application is an Excel file and is modifiable. Add data as needed into your folder until the deadline date of **June 23, 2021**. We encourage you to save as you go.

Once you are in a document library, you will see a main menu running horizontally across the top of the page where you can create or upload files.

1. Documents can be created directly in the system. Click on the "+ New" link to create new content, such as a Word or Excel file. If your document has already been created, click on the Upload button to put the existing document into the system.
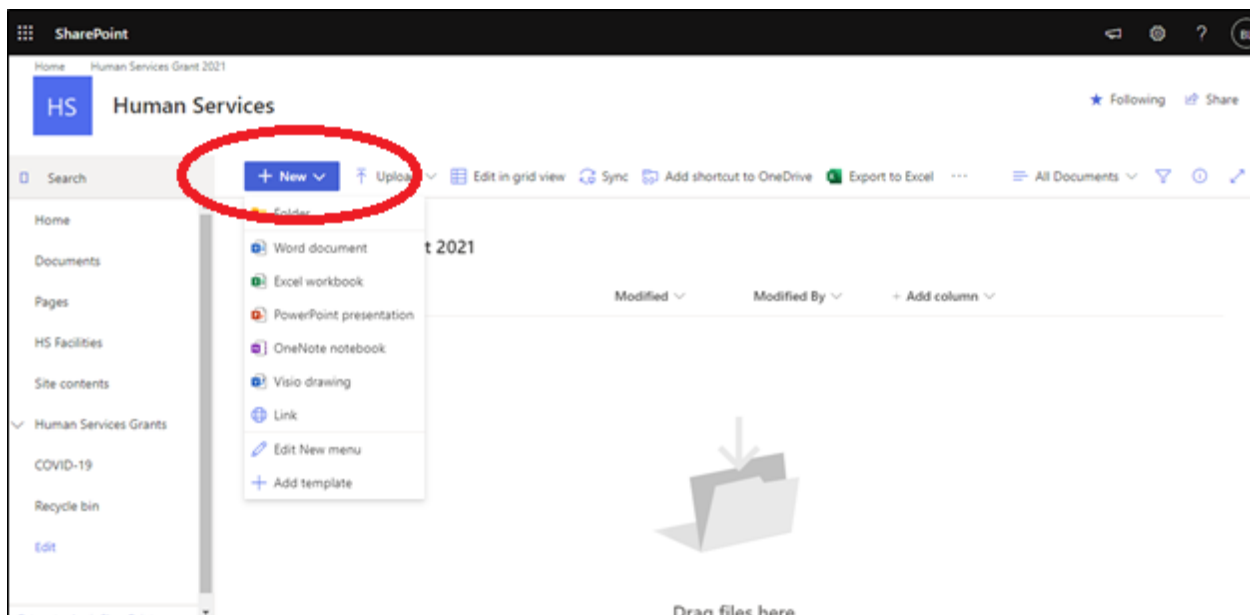

2. The main menu will change based on when you select a folder or file individually as opposed to just looking at a list of items. Right clicking the file or hovering over the file in the list and hitting the ellipsis menu (…) next to the file name will define further actions to take with the folder or file.

3. Change your view from All Documents to a list of items, a grid full of items, or the All Documents view from the top right. Internet Explorer, Google Chrome, and Mozilla Firefox are all recommended for viewing the Human Services SharePoint site. In list or grid view, you can add and rearrange columns by clicking the + and Arrange buttons.

The details pane, shown at right in the screenshot on the next page, is part of a process of keeping clean metadata about files and other items. This makes it much easier for SharePoint to learn what we work on and to populate suggestions about related content, for administrators to be

able to apply record retention policies and document lifecycle management, and for search to return better, more relevant results, among other benefits.
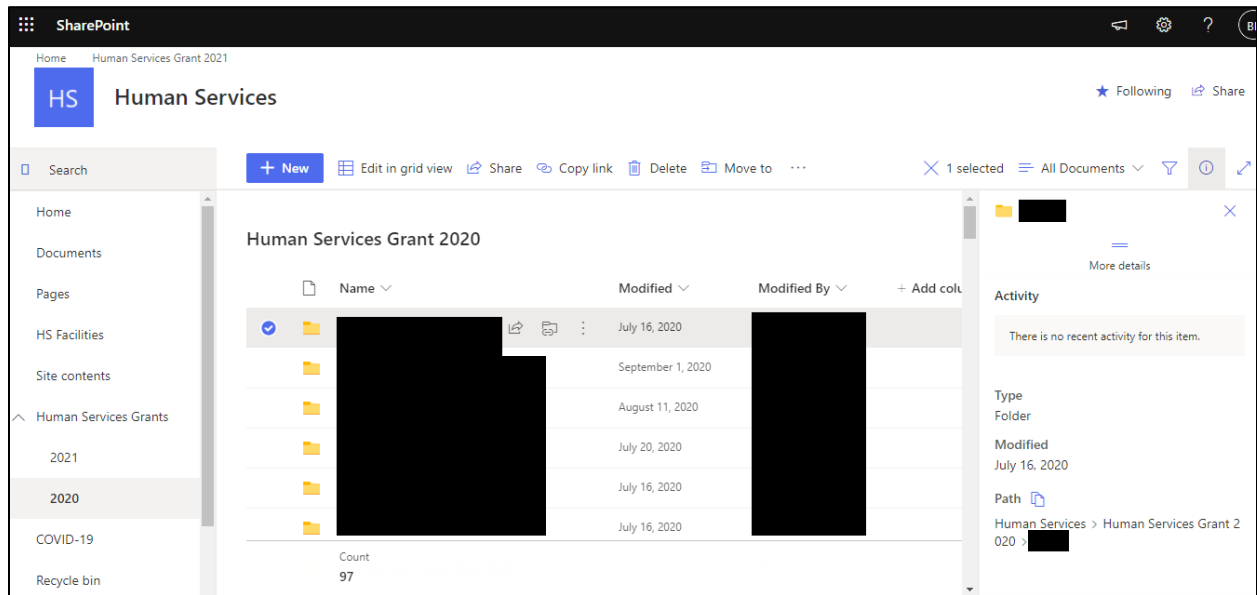
1. Hover over the file name in the list and then click the three dots (the ellipsis) beside the file and you get a complete menu of options.

   a. ***Open/Edit*** – Here, you will open documents either in the Office 365 online versions of their respective apps or the desktop versions. Please note that if the files are opened on desktop versions, Microsoft Office will need to be fully installed onto the computer you are using. If not, it is recommended to work from the online version within SharePoint.

   b. ***Share*** – Site Administrators will have overall access to anything uploaded or created on SharePoint. When you click on Share in the menu, a small window called "Send Link" will be displayed. From this, a direct link to the document you are sharing will be sent to another party.
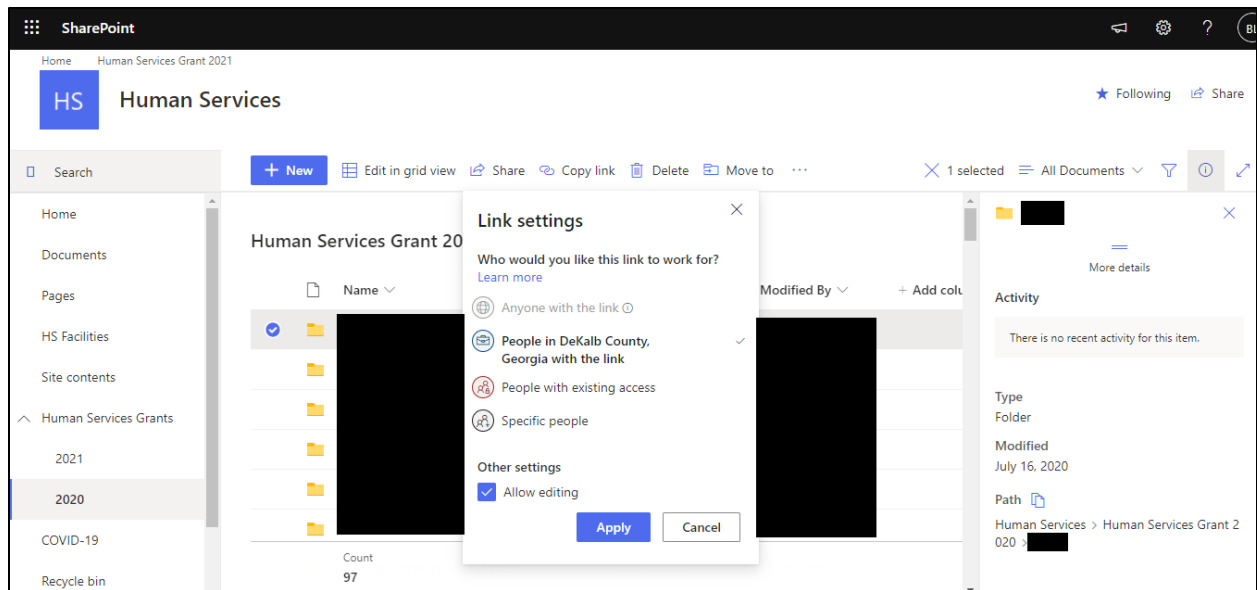
i. Carefully choose which to select when sharing:

    1. **People in DeKalb County, Georgia with the link.** This makes the document available to anyone with access to all in DeKalb County Government, even if they don't already have access. It also prevents anyone externally from seeing the document.

    2. **People with existing access.** This does not change permissions at all but simply generates a link for convenience and easy sharing.

    3. **Specific people.** This allows you to invite individuals, including those external to DeKalb County, to view (and, if you choose, to edit) the file.

ii. You then click Apply.

c. **Download –** This gives you a prompt to save a copy of the document to your local computer.

d. **Pin to Top –** This pins a link to the document in question to the top of your window.

e. **Move To** and **Copy To –** Allows you to put documents in different libraries or other locations on your site.

f. **Rename –** Changes the name.

g. Under the **More** menu, you have:

1. **Properties –** Selecting this option opens the document properties page, where the metadata of a specific file is stored.

2. **Workflow –** This is an advanced option with lots of scope that will need to be reviewed by the site administrator which will make workflow options configurable.