

UAS Mosaic Sharepoint guidance

The [UAS Mosaic Document hub](#) site was built on SharePoint to provide a location for online storage of shared files on the UAS Mosaic websites behind SSO.

This differs from public-facing documents which will be hosted on Mosaic itself. Instead, specific web pages behind SSO – permission to access these pages is administered through the Mosaic platform.

Files added to the SSO SharePoint Online site are accessible through publicly accessible webpages.

For guidance when considering whether content should be behind SSO, please see [SSO guidance for UAS editors](#).

Each UAS section has been given its own library. All SSO documents that are accessible via Mosaic must be stored on these sites. All documents linked to from Mosaic must be accessible to all staff. This is the default setting in the sites, and must not be changed.

1. Library Owners

The 'Lead editor' of each site will be set up as the library Owner – this is in addition to the UAS Website Manager and who will oversee all libraries.

Library Owners will be able to add 'Members' to the library.

- Members can upload new content to SharePoint and update existing content. Therefore, there is no necessity to establish additional Owners of the site as Members will have all the required access.

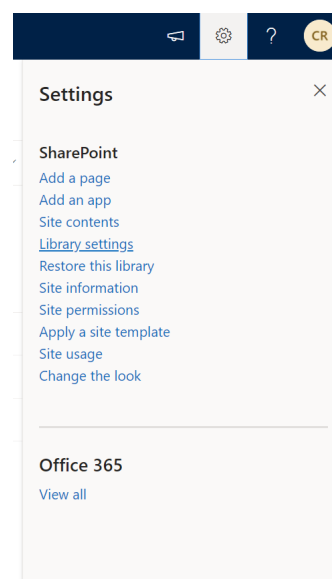
Although Owners have full control over the library, no other settings on the site should be changed.

- **Other than adding new members, the permissions should not be altered in any way, and no alternative restrictions should be established. If a file is not suitable to be viewed by all members of staff, it should not be linked to from Mosaic.**

If the 'Lead editor' is not the most suitable person to act in the role of Owner, then please notify UAS Website Manager – uas.communications@admin.ox.ac.uk – so a new Owner can be put in place.

1a. Adding Members

From the options in the top right corner of the page, click the 'cog' icon, and then select 'Library settings'



From the Settings (Cog icon) menu, select 'Permissions for this document library' part of the menu:

List Information

Name: Communications

Web Address: https://unioxfordnexus.sharepoint.com/sites/ADMN-UASMosaicDocumentHub/Communications/Forms/AllItems.aspx

Description:

General Settings	Permissions and Management	Communications
<ul style="list-style-type: none"> List name, description and navigation Versioning settings Advanced settings Validation settings Column default value settings Audience targeting settings Form settings 	<ul style="list-style-type: none"> Delete this document library Save document library as template Permissions for this document library Manage files which have no checked in version Apply label to items in this list or library Enterprise Metadata and Keywords Settings 	<ul style="list-style-type: none"> RSS settings

The next screen should display the access groups for the library. Click the Site name 'Members' group – permissions level 'Contribute'.

Name	Type	Permission Levels
ADMN - UAS Mosaic Document Hub Owners	SharePoint Group	Full Control
ADMN - UAS Mosaic Document Hub Visitors	SharePoint Group	Read
Communications Members	SharePoint Group	Contribute
Communications Owners	SharePoint Group	Full Control

Note that Library Owners will not be listed as Members. As Owners can do the same as Members and more, there is no necessity for them to be also added as a Member.

EDIT LINKS

Search this site

People and Groups > Communications Members

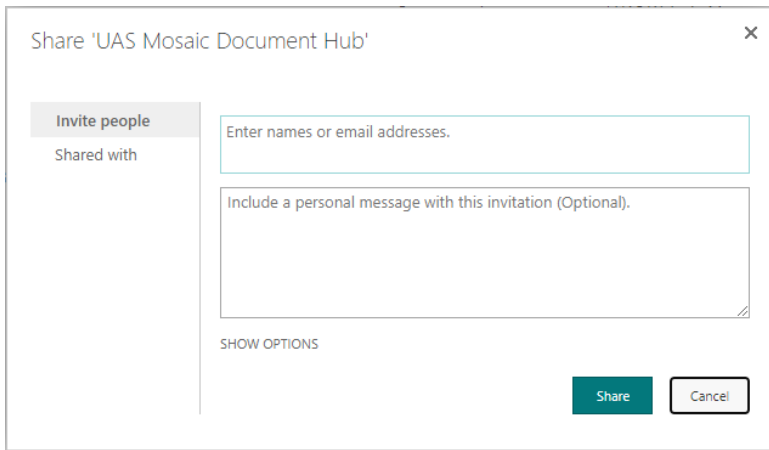
New Actions Settings

View: Detail View

Name About Me Job Title Department

From the options above the list of current members, click 'new'.

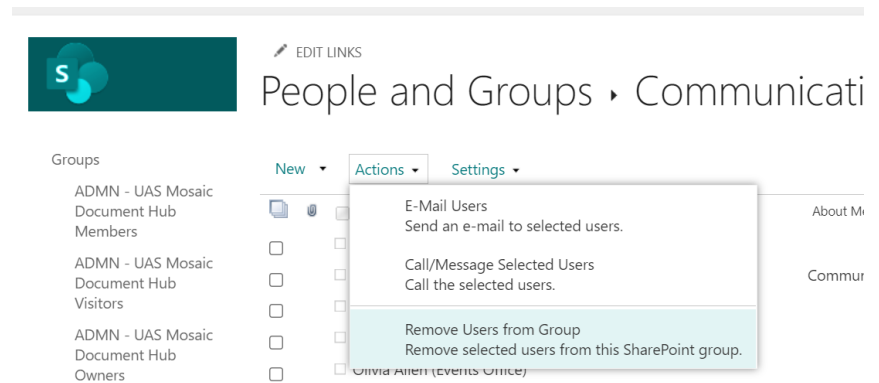
In the top box, give the names or email addresses of the people you wish to add as Members. Add a message in the box below, if you wish, and click share:



The member will then appear in the list. They will receive an email with a link to the library, and they should log in with SSO to access it.

1b. Deleting Members

If you wish to remove someone (or multiple people) from the list of Members, and therefore revoke their permissions to access the management area of the library, check the box adjacent to their name, and from the menu in the 'Actions' tab, select 'Remove Users from Group'.

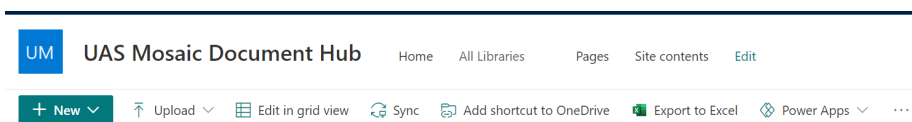


2. Managing Content

Content on the library can be managed by both Owners and Members

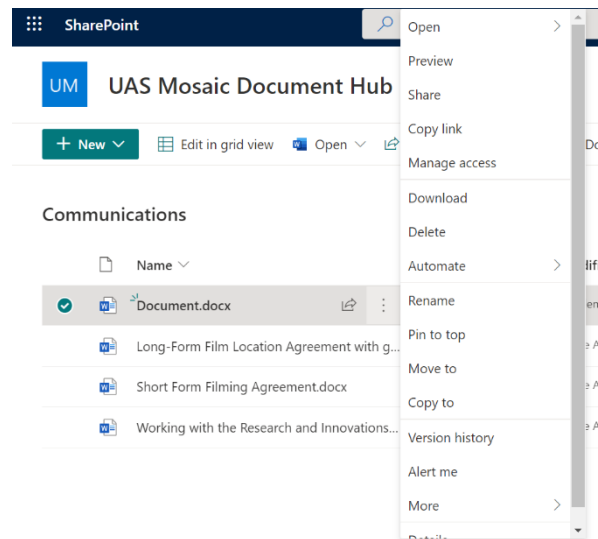
2a. Adding content

To upload a document to the library, click the 'Upload' button on the library page, then file. This will open explore and select the document you wish to load:



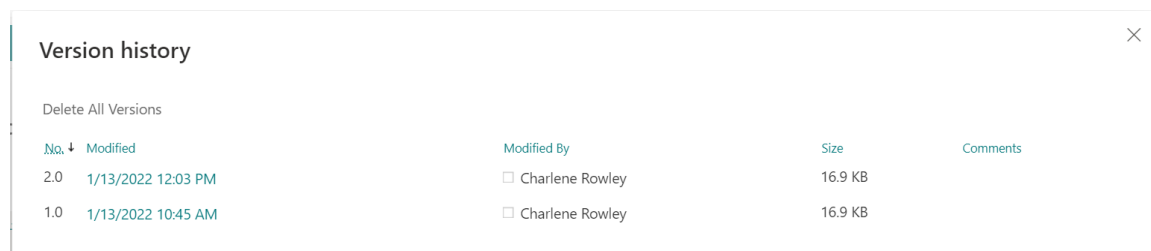
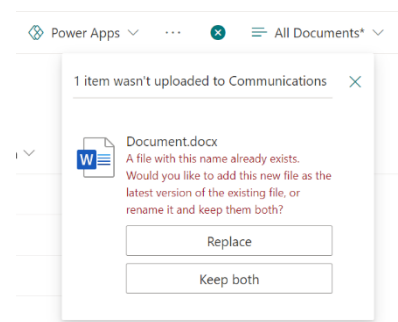
Or you can drag the file onto the library however, this does not provide the opportunity to edit some of the features of the document mentioned below.

Click on the toggle next to the document you wish to edit, click show actions (the three dots next to the document title) scroll to the bottom of the list and click 'Details'. A window will appear to the right of the page, scroll down to 'Properties' here you can edit the name, add a title.



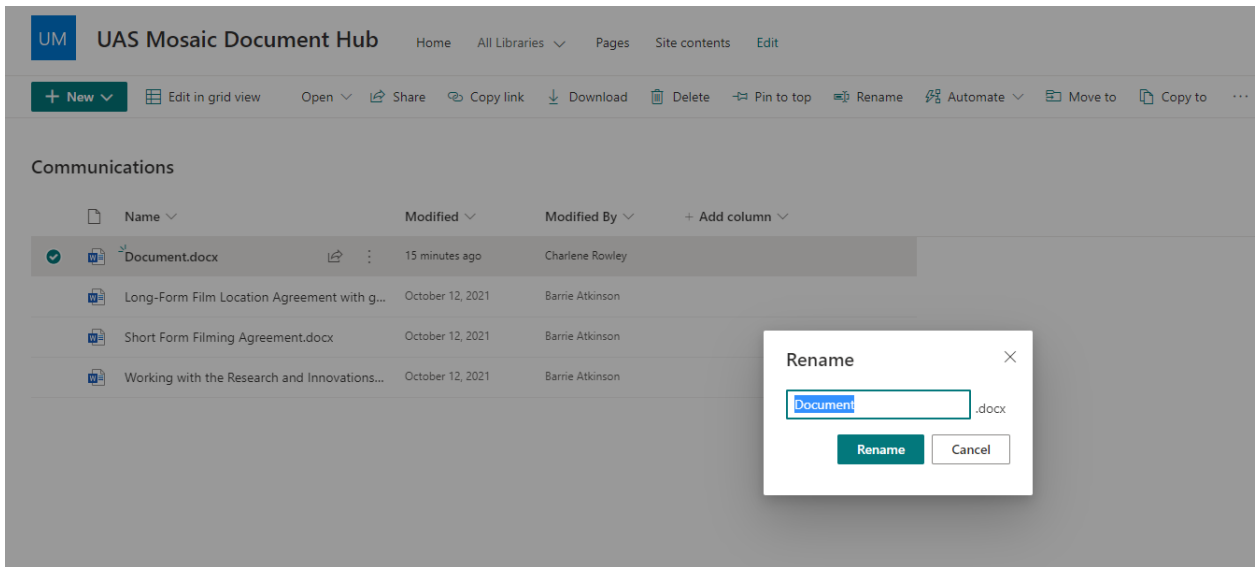
2b. Replacing a document with a newer version

If you wish to update a document with a newer version. Ensure that the document you are adding has the same file name as the one you wish to update. The system will ask if you would like to 'Replace' or 'Keep Both' click 'Replace'. The version number will also be updated. Older versions are 'archived' so can be viewed or retrieved at a later date if necessary (see [here](#)).



2c. Renaming a document

If a document has been uploaded, and you wish to change the document name, click select the document in the library, and then click 'rename' from the ribbon of options.

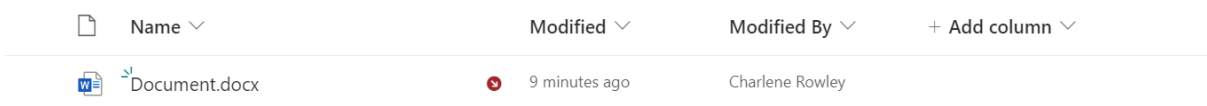


2d. Check out and check in of documents

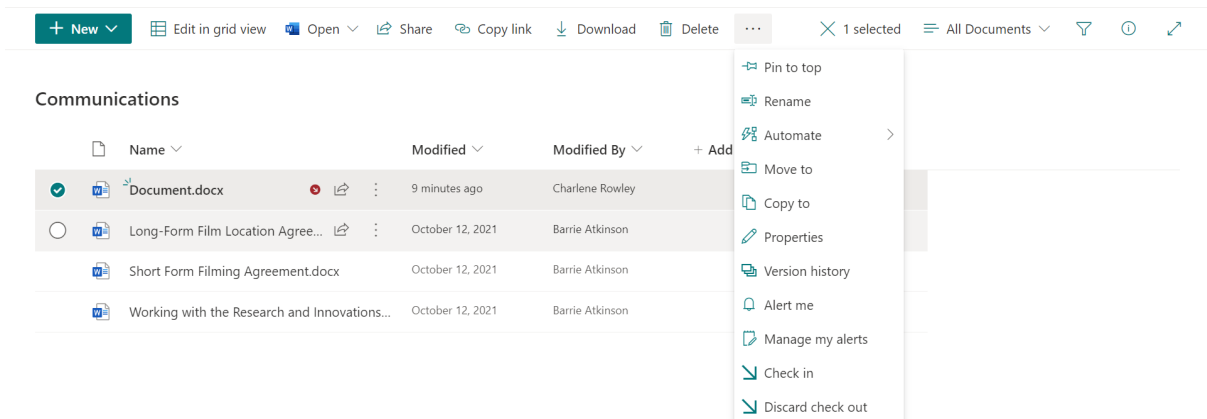
So as to ensure that two people are not making changes to a document on SharePoint at the same time, a 'check out' and 'check in' system is in place. Like borrowing books, you 'check out' something you want to use, and 'check in' the document when you have finished with it.

Whether or not a document is checked in or out does not affect whether the previous version can be accessed by those linking to a URL. It does, however, affect whether the most recent edits can be viewed.

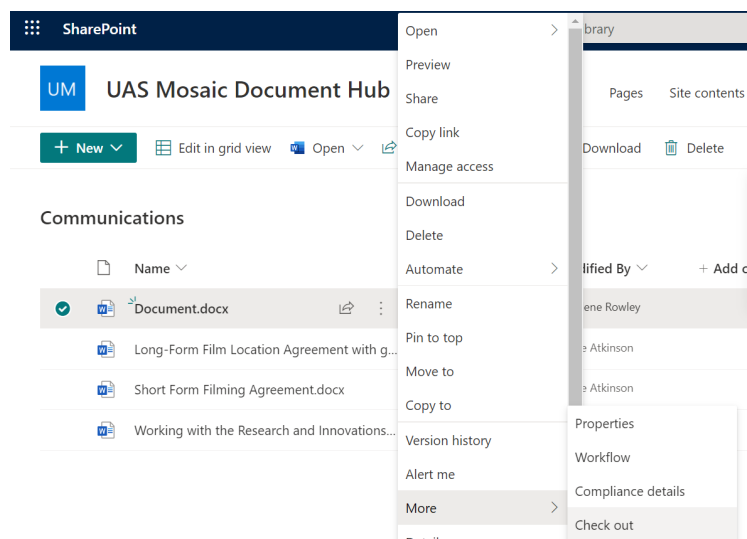
When a document is opened for editing you will be prompted to check it out. When a document has been checked out it is shown in the list with a red or green arrow. The name of the person who has checked it out will appear when you hover over the arrow.



If you need to make other changes to a document, such as restoring a previous version, you can check it out by either: clicking to select the item in the library and clicking the 'check out' option in the 'files' menu;



Or by clicking on the ellipses (...) next to the document name in the library, clicking the more in the settings window, and selecting 'check out' from the resulting menu.



When a document is checked out no one else can change it, and no one else can see your changes while you have it checked out. You cannot check out a file that someone else has checked out. If you attempt to do so, a message will let you know that the file is checked out by someone else.

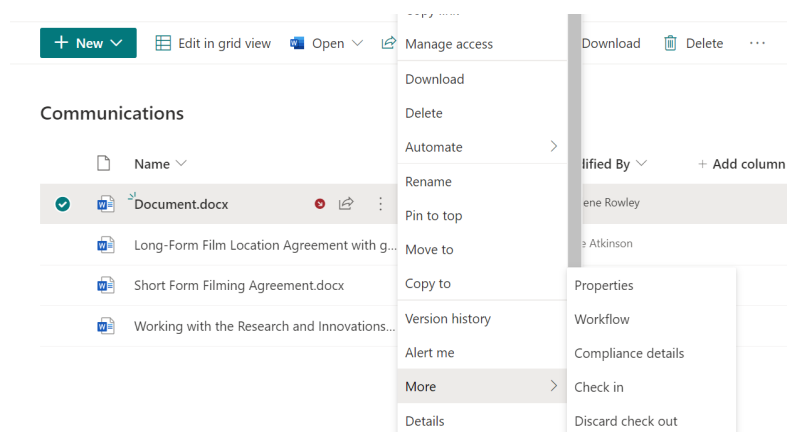
If there are others who may wish to work with the document it is both good business practice and common courtesy to check the file back in as quickly as possible after you check it out.

Checking documents in

If a document is checked out to you, then it will be checked back in if you upload a new version which replaces the version you have checked out.

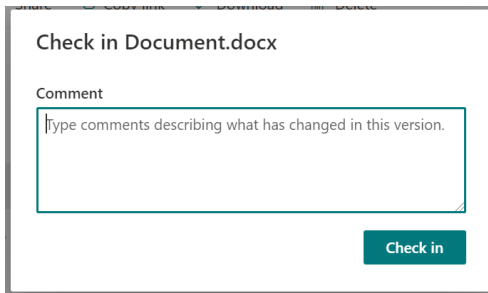
If you do not intend adding a new version you need to take action to check the document in. You have two options – actively 'check in' the document, or 'discard check out' of the document.

Both options are accessed by clicking on the ellipses (...) next to the document name in the library, and clicking the ellipses (...) in the footer of the resulting window.



'Discard check out' will not save any changes which you have made, but it will also not prompt you to make any revision to the current version of the document.

If you check in the document, you will be prompted to add a comment 'Type comments describing what has changed in this version'.

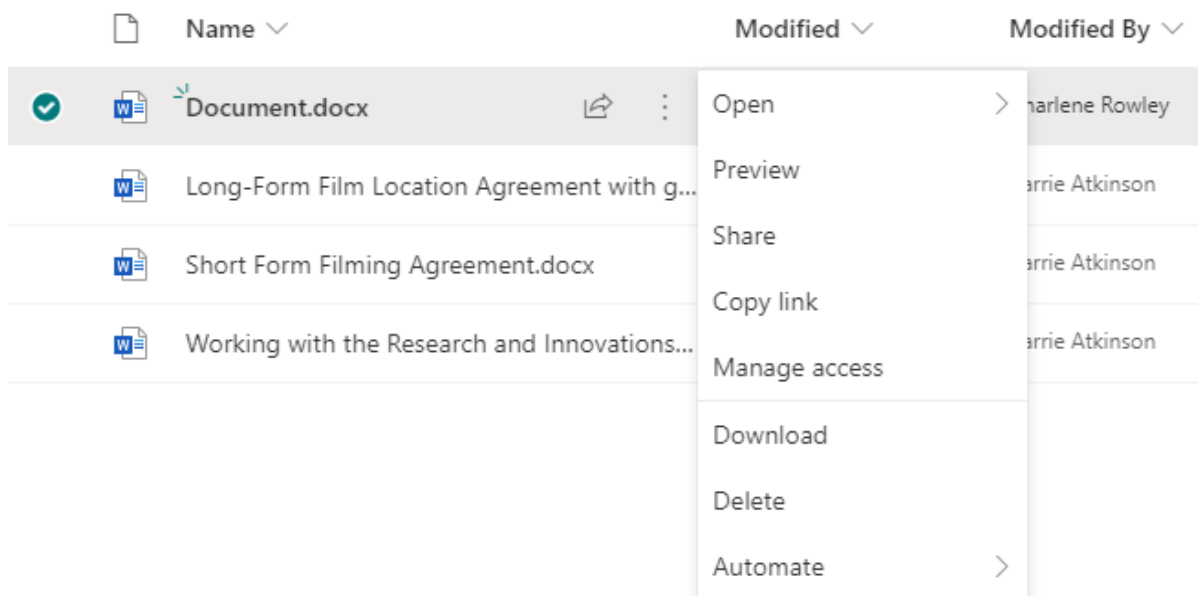


2e. Deleting a document

It's important to note that users who are logged into the Sharepoint library can view **all** the documents you have stored there, not just the one they clicked on the Mosaic website. **If a document is out of date, it therefore must be deleted from the Sharepoint library.**

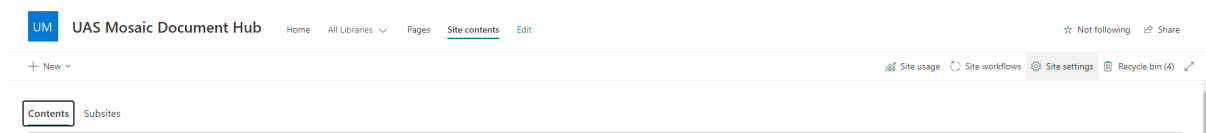
Click to select the document in the library, and then click 'Delete' from the ribbon settings at the top of the screen.

Alternatively, click the ellipses (...) next to the document name in the library, and then click the 'delete'.



Retrieving a deleted document

Return to the main UAS Mosaic Document Hub homepage, Click site content, Click site settings, this will display the settings that are available to manage the site.



Now click 'Recycling bin' and click the toggle next to the document you want to retrieve and click 'Restore'. This will return the document to the library it was deleted from.

EDIT LINKS

Site Settings

Users and Permissions

People and groups
Site permissions
Access requests and invitations
Site collection administrators
Site app permissions

Web Designer Galleries

Site columns
Site content types
List templates
Themes
Solutions
Composed looks

Look and Feel

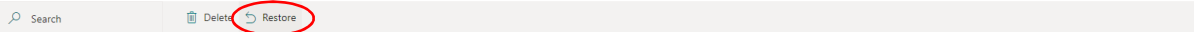
Title, description, and logo
Quick launch
Change the look

Site Actions

Manage site features
Enable search configuration export
Delete this site

Site Collection Administration

Recycle bin
Search Result Sources



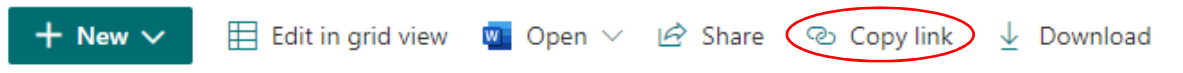
Recycle bin

Name	Date deleted ↓	Deleted by	Created by	Original location
Document.docx	1/13/2022 12:24 PM	Charlene Rowley	Charlene Rowley	sites/ADMIN-UJASMosaicDocumentHub/Communications

2f. Linking to a document from Mosaic

2f(i). Locating the URL

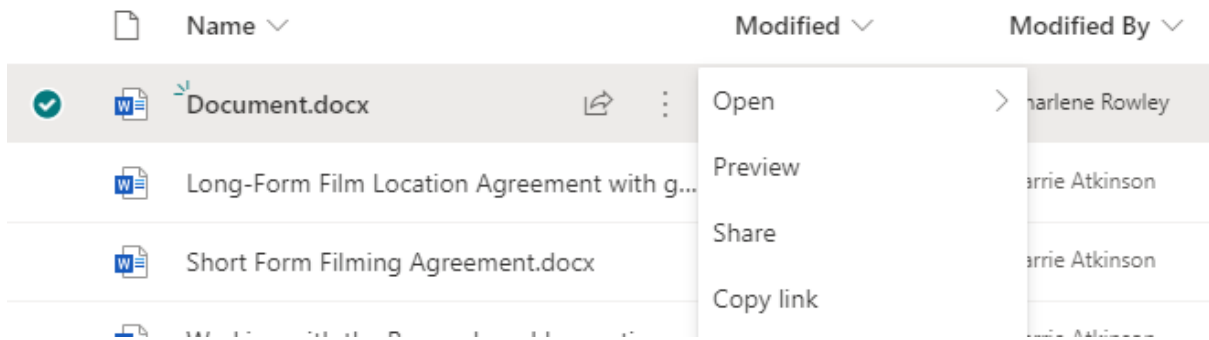
The URL for linking to a document hosted on the Mosaic Library on SharePoint can be seen by selecting the document and 'copy link' will appear in the top ribbon settings.



Communications

Name	Modified	Modified By
Document.docx	13 minutes ago	Charlene Rowley

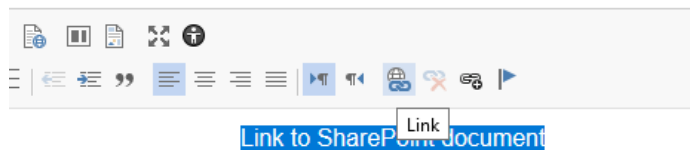
Or clicking on the ellipses (...) next to the item's name in the document library. The URL is found towards the bottom of the window which appears.



Copy the URL and paste it in to the relevant place in Mosaic to create the link from your site to this document.

2f(ii). Adding a link in Mosaic

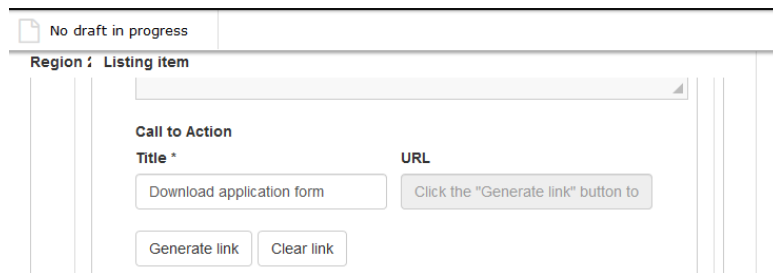
If linking from within a WYSIWYG, highlight the text or graphic (such as the button provided in Region 3 of some templates) which you want to turn in to a link, and click the 'link' icon. Then paste the link in to the URL box in the 'link info' tab. No other settings need be changed.



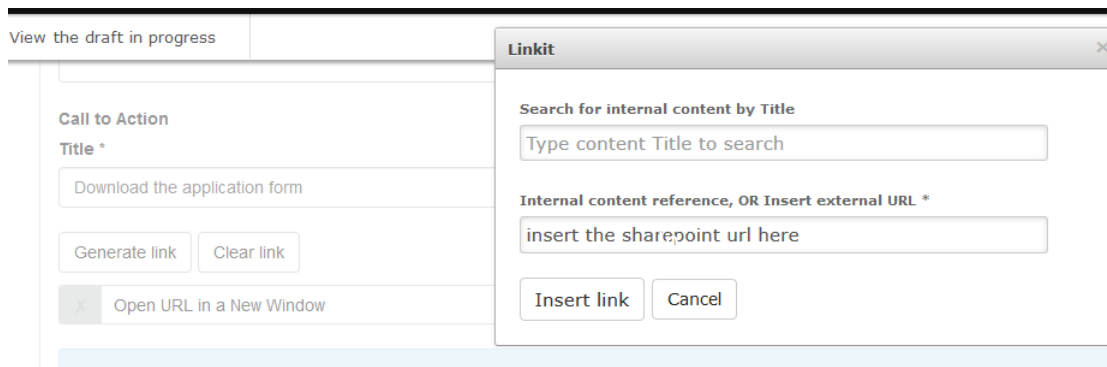
If you want to turn a link into a button, write it in capital letters (eg DOWNLOAD), then highlight the link and select a button style from the "Style" drop-down in the WYSIWYG toolbar.

If you are linking from content in a grid or listing, where items have a 'call to action', first locate the Call to Action section of the Listing Setup area. If the content has its own page then this will be in the Details tab of the editing area. If creating 'static content' within a grid or listing widget, then this is within that area of the widget.

Insert an appropriate title in the 'Title' field, and then click within the grey URL box.



A new window will open, and paste the URL which you copied from SharePoint in to the lower of the two boxes and click 'Insert link'.



2f(iii). Updating or changing links

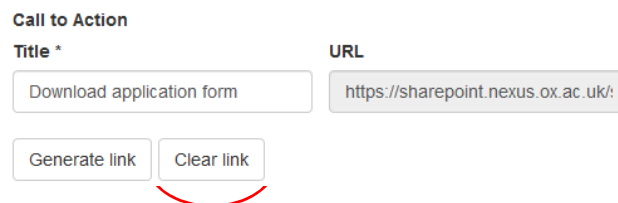
If you update a document on SharePoint, and the name of the document does not change, then there is no necessity to update the link in Mosaic.

If, however, you change the title of the document – either when adding a new version, or simply changing the title of an existing version – then the URL will change and you will need to update the link in Mosaic. The process for this is similar to adding a new link.

Firstly find and copy the URL in SharePoint as above.

To edit a link in the WYSIWYG section, clicking the linked text (which will be underlined) so the cursor is within the word, or highlight any graphical aspects which carry the link. Click the 'link' icon, and in the window which appears the existing URL to which it is linking will be shown. Delete this URL and paste in the new URL which you copied from SharePoint.

If editing a link from a 'call to action', first click the 'clear link' button, then click in to the grey URL box, and then paste the new URL copied from SharePoint.



2g. Looking at, or reverting to, previous versions

Older versions of documents can be viewed, or even restored if they have been inadvertently overwritten or wrongly edited.

Click the ellipses (...) next to the document name in the library, then click 'Version History'. The window which appears, identify the version which you wish to view or restore.

Hover over the time and date of that version, and click the down arrow which appears. This gives a menu from which you can choose to 'view', 'delete' or 'restore' the version.

Version history

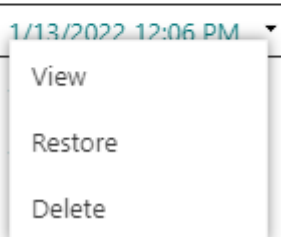
Delete All Versions

No. ↓	Modified
4.0	1/13/2022 12:24 PM
3.0	1/13/2022 12:06 PM
2.0	1/13/2022 12:03 PM
1.0	1/13/2022 10:45 AM

Version history

Delete All Versions

No. ↓	Modified
4.0	1/13/2022 12:24 PM
3.0	1/13/2022 12:06 PM
2.0	1/13/2022 12:03 PM
1.0	1/13/2022 10:45 AM



Note that in order to restore an older version, the document must be checked out to you (see [here](#)).

If you restore the older version then it will be renumbered as the newer version – for example restoring version 0.2 will make it version 0.4, and the old versions 0.3 and 0.4 will be renumbered.

2h. Organising your content

Do **not** create folders within your SharePoint site. Among the reasons why is the concern that doing so creates an issue of ensuring accurate maintenance of access permissions – this can be avoided by putting all documents in the main folder.

Instead of using folders, you should ensure that the content is organised within your library in such a way that others contributing to the library can easily find documents.

For example, rather than creating a folder entitled 'policies' in to which you might put such documents, start the file name of these with *policy_*.

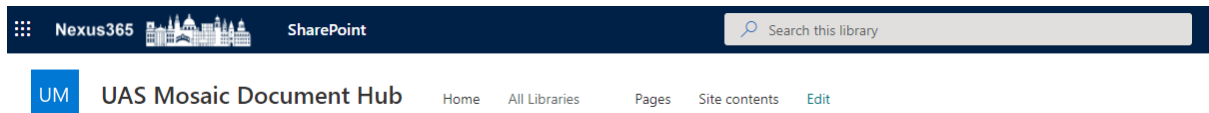
The URL which you will use to link to the document will be created from the file name which it is given. You should therefore ensure that:

- the file name is descriptive, and meaningful to the users of both the library and the website from which they will be linking to the document (so avoid using internal references or jargon)
- the file name is as succinct as possible

- the file name only includes a date when different versions of the same document are online (and need to be online)
- the spaces between words are not included (as these will be replaced by %20 when the URL is created, making it cumbersome, and more awkward to read) and instead words are separated by an underscore – for example, policy_naming_documents.pdf
- you are consistent in your use of capital letters

2i. Searching for content

The search feature at the top of the site can be used to search for content within the documents as well as in the file name:



The library can be sorted by each of the columns. Clicking on the column header sorts the library by that column in either ascending or descending alphabetical or chronological order. Hovering over the header also makes available an arrow which can be used to access a drop-down menu. In the 'modified by' and 'created by' columns, within this menu, is a filter option, allowing you to identify content created or modified by specific users. Likewise the 'created' column can be filtered based on dates on which content was created.

