

## Purchasing Card Record Storage Admin Training

This class will introduce you to the UWM Purchasing Card Records SharePoint site and the process for auditing and managing records. To access SharePoint, you will need to log into Office 365.

Office 365 is available on any device with an internet connection and a browser. Office 365 works with desktop computers, laptops, tablets, and mobile devices. To access and log into Office 365 go to:

[uwm.edu/office365](http://uwm.edu/office365)

### What is SharePoint?

SharePoint is a part of Office 365 that allows users to create and access websites used to collaborate, communicate, organize and access information from almost any device using a browser. A SharePoint site can be as simple as a repository for documents to complex multi-page sites housing tools such as task lists, contact information and calendars. Because of the integration with Office 365, you can create and edit Microsoft Office files (such as Excel, PowerPoint and Word) within SharePoint.

### The UWM Purchasing Card Records Site

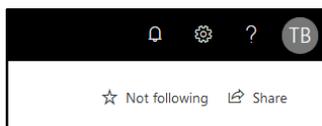
To access the UWM Purchasing Card Records Site, go to:

<https://panthers.sharepoint.com/sites/pcard/>

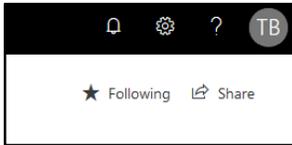
*Make the site a favorite:*

To ensure that you can easily locate the site, once the site launches you can save it as a favorite.

1. Locate the **Favorite** star in the upper right corner of the screen.

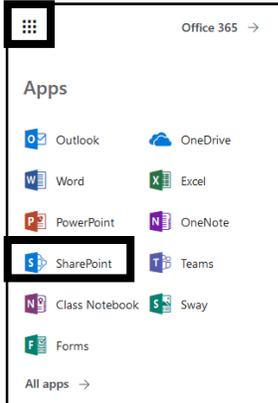


- Click the star to follow the site.

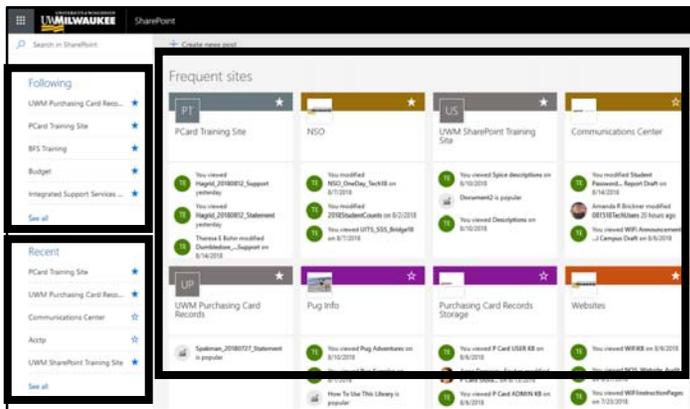


To navigate to a favorite:

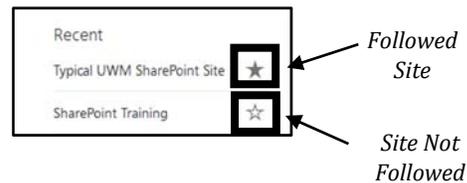
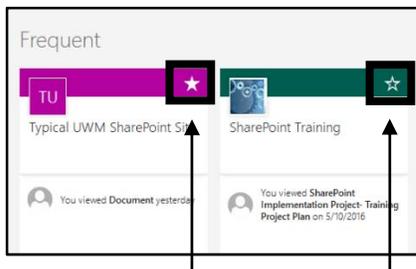
- Click the **Apps Grid** in the upper left corner of the screen. The list of apps appears; choose **SharePoint**.



- When the SharePoint app loads, you see a list of all the sites you can access. The pane on the left contains a list of the sites you are **Following** and a list of **Recent** sites you visited. The middle of the screen also shows **Frequent** sites.



- Click on the name or tile for the site to navigate to the site.
- Sites that have an empty star are sites that are shared to you that you have not yet followed. To follow a site, click inside of the star to fill it in, this will work in the **Recent** and **Frequent** sections.



5. If you cannot find the site you want to visit, click in the **Search bar** at the top of the left pane and type in the name of the site.

*Bookmark the site:*

Because SharePoint sites are web pages, you can bookmark a SharePoint site in your browser.

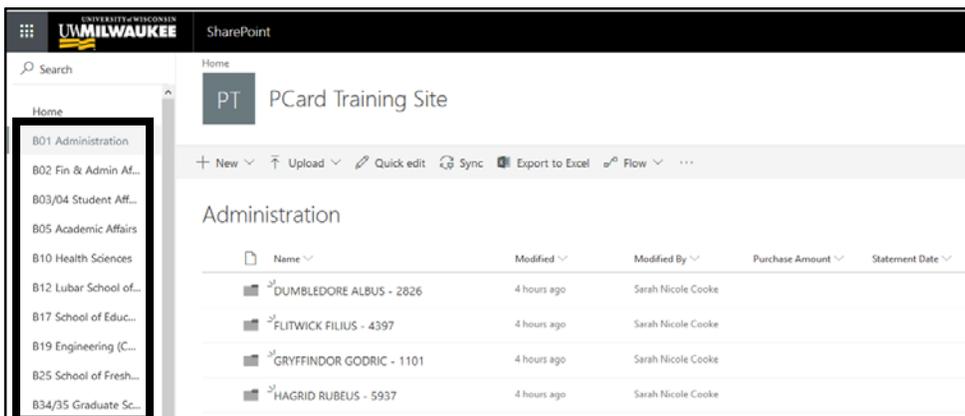
1. Go to the SharePoint site you want to bookmark.
2. After the site loads on the page, you can use the **Bookmark** tool in your web browser to bookmark the site.

**NOTE:** If you do not know how to locate or use the **Bookmark** tool in your browser, read the browser help files for instructions.

3. Once the site is bookmarked, you can go to your bookmarks and click on the link for the site to visit the SharePoint site. You may be prompted to log into Office 365 before you can access the site.

## Navigating the UWM Purchasing Card Records Site

Along the left side of the screen is a list of divisions. Click the division name to see the list of p-card holders.

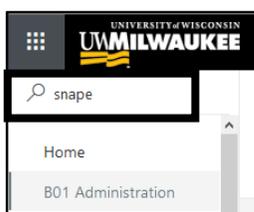


**NOTE:** Some of the division document libraries will also have folders for each department. Clicking on the name of the department will show the list of p-card holders.

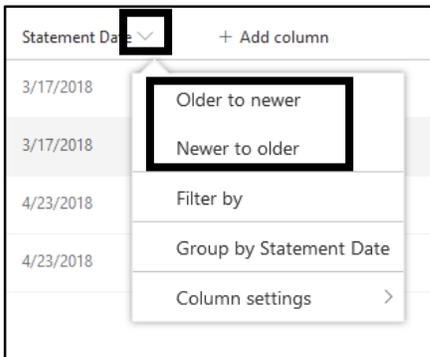
## Search, Sort & Filter

By default, the list of p-card holders will be in alphabetical order by last name. Using search, sort and filter, you can quickly locate specific card holders.

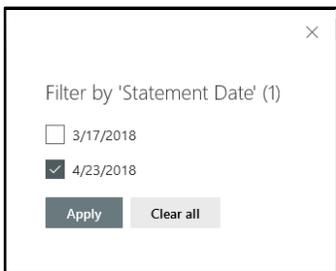
1. To search for a card holder, click inside the **Search** box in the upper left corner of the screen (above the division list). Type in your search terms; this could include the p-card holders last name, first name or the last 4 digits of their card. Press the **Enter** key on the keyboard to search.



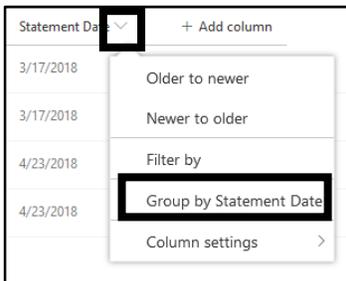
- To change the sort order of a column, click the down arrow next to the name of a column. From the menu, choose a new sort option.



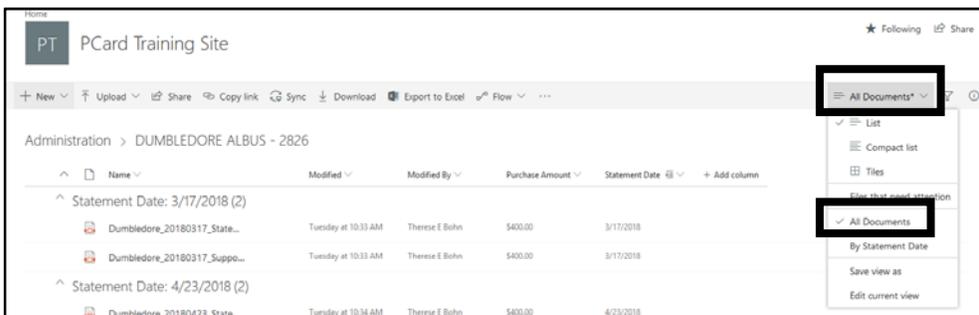
- To filter for specific results, click the down arrow next to the name of a column. From the menu, choose **Filter by**. This will open a pane on the right side of the screen. Choose the filter options and click **Apply**.



- To group by records, click the down arrow next to the name of a column. From the menu, choose **Group by**.



- To return to the default view of the document library, on the top toolbar, click the **All Documents** button. From the menu, choose **All Documents**.

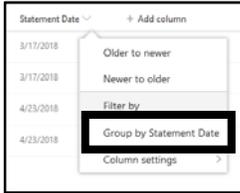


## Views

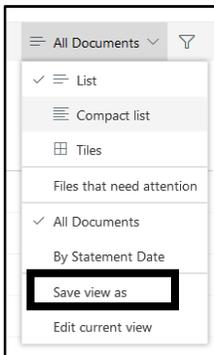
If you find that you are performing the same sort, filter or grouping each time you go into a p-card holder's folder, you can create a **view**. A view is a custom set of sort, filter or grouping options that you can save and then apply to a folder.

*To create a view:*

1. First, set your own sort, filter and group options in the folder.



2. Click the **All Documents** button on the top toolbar. From the menu, choose **Save view as**.



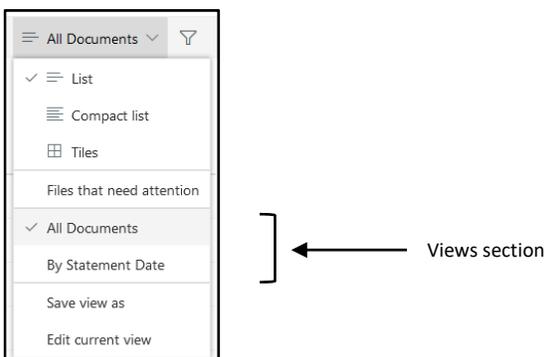
3. Name the view, check the box if you want to make the view public and then click **Save**. If you make the view public, other people using this folder can see and apply your view to the files.

*To use a view:*

1. On the top toolbar for the document library, click the **All Documents** button.



2. From the menu, locate the views section; the first item in the section will always be **All Documents**. Choose a view from the section.



3. To return to all the documents in the folder, click the button with the name of the view and choose **All Documents**.

## Auditing Files

Once you have located the files for a p-card holder you can view and modify the files.

### View a File

1. To view a file, click the name of the file and it will open in the browser window.

### Rename a File

1. Right click the file to be renamed and choose **Rename** from the menu.
2. Type in the new file name and click **Save**.

### Delete a File

1. Right click the file to be deleted and choose **Delete** from the menu.
2. Click **Delete** in the confirmation window.

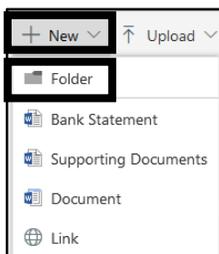
**NOTE:** To restore a file that was deleted, click the link for the **Recycle bin** in the left pane. Right click the name of the file and choose **Restore** from the menu. Files will be automatically deleted from the Recycle bin after 93 days.

## Adding a New P-Card Holder

If there are new p-card holders in your area, you can add a new folder and share it to that person.

### Create a New Folder

1. Navigate to the division document library for the new p-card holder. For p-card holders in some divisions, you will also need to navigate to the correct department folder.
2. On the top toolbar, click the **New** button and then choose **Folder**.

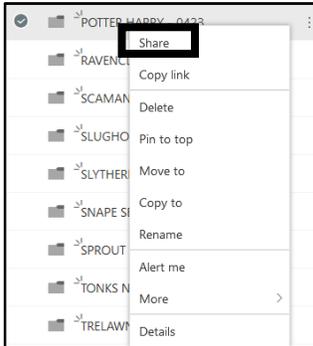


3. Name the folder using the naming convention **LAST FIRST Last 4 Digits of Card**.  
For example: **POTTER HARRY 0423**
4. Click the **Create** button.

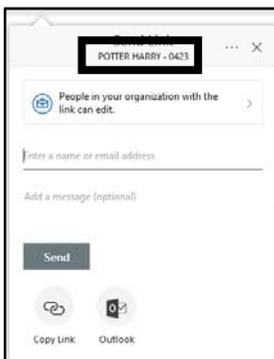
## Set Folder Permissions

Once the folder is created, you can share it to the user so that they can access the folder and put in statements and supporting documents.

1. Right click on the name of the folder you want to share. From the menu, choose **Share**.



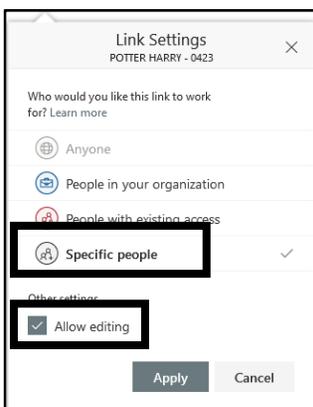
2. Ensure that the Share dialog box contains the correct folder name at the top before proceeding.



3. Click the button at the top of the box that has the text **People in your organization with the link can edit.**



4. In the next box, choose **Specific people** and ensure that the box is checked for **Allow editing**. Click **Apply**.



5. You will be back in the first box. Enter the name of the p-card holder (and any designates) in the **Enter a name or email address** box.

6. Send the link:

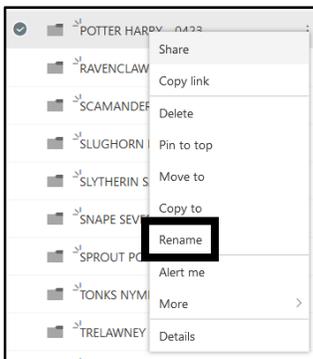
- To send a message through SharePoint, type in a custom message (if desired) in the **Add a message** box and then click **Send**.
- To send your own custom message, click the **Copy Link** button. Create a new email message and paste in the link and send.
- To send your own custom message from Outlook in Office 365, click the **Outlook** button. This will open a new browser window that will have a new email message that contains the link to the folder. Finish the message and then send.

## Deactivating a P-Card Holder

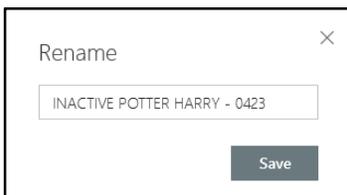
When a card becomes inactive for any reason (such as changing departments or termination of employment), you are responsible for noting this in the UWM Purchasing Card Records site and removing user permissions.

### Rename the Folder

1. Navigate to the division document library for the inactive p-card holder. For p-card holders in some divisions, you will also need to navigate to the correct department folder.
2. Right click the folder and from the menu choose **Rename**.

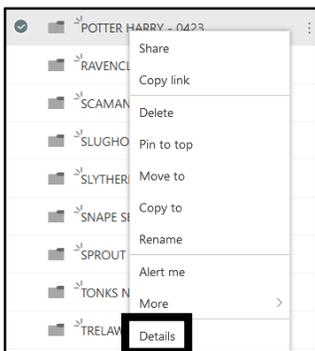


3. Type the word **INACTIVE** to the left of the p-card holder name and click **Save**.

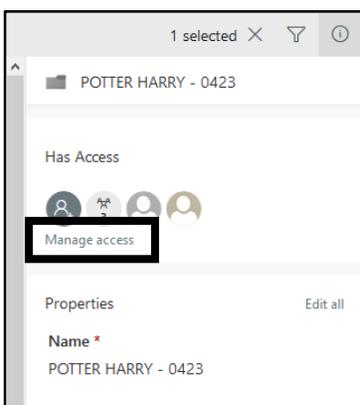


## Remove Permissions

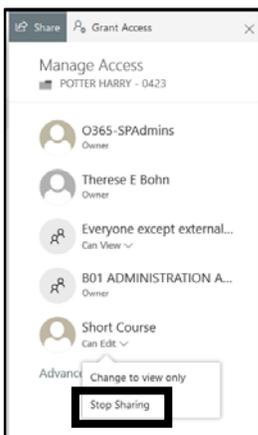
1. Right click on the name of the folder you want to remove permissions for. From the menu, choose **Details**.



2. In the pane that opens on the right, click **Manage access**.



3. Locate the user and click the **Can Edit** button. From the menu, choose **Stop Sharing**.



4. Close the sharing pane and the informational pane.