

# YWHO SharePoint How-to Guide



A Guide To Account Set-up, File Share  
And Collaboration.

May 2024



youth  
wellness  
hubs  
ONTARIO

wellness  
your way



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# YWHO SharePoint

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- [YWHO SharePoint](#) supports file/document/resource sharing and collaboration across teams.
- YWHO Networks have access to the external [YWHO Network Partners Documents](#) library.
- Individual users have access to their hub-specific folder and shared folders.

*\*User access will differ depending on designated permission levels. If you require additional access, submit a request through [YWHO HelpDesk](#).*



# YWHO SharePoint: Purpose & Goals

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- YWHO SharePoint is a resource to house different components, such as communications materials, training materials, implementation tools, data repots, financial trackers, etc.
- The YWHO Networks are encouraged to add resources relevant to their staff, such as Service Pathways, Committee Meeting Minutes, outreach posters, etc.
- The Networks are encouraged to add resources to the shared folders that are relevant across Networks, such as job profiles, service pathways, out reach posters, etc.

# Quick Tip: Bookmark

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- For ease of access, bookmark the [YWHO Network Partner Library](#) link to your default browser, or create a desktop shortcut

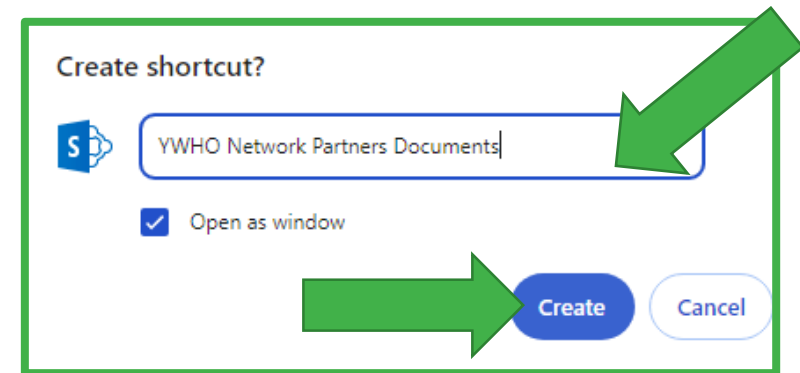
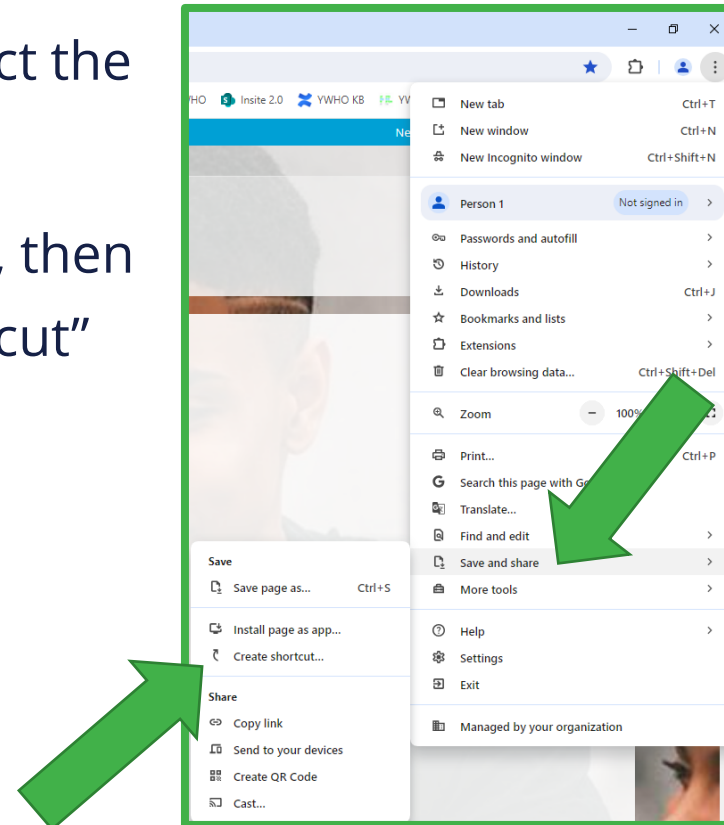
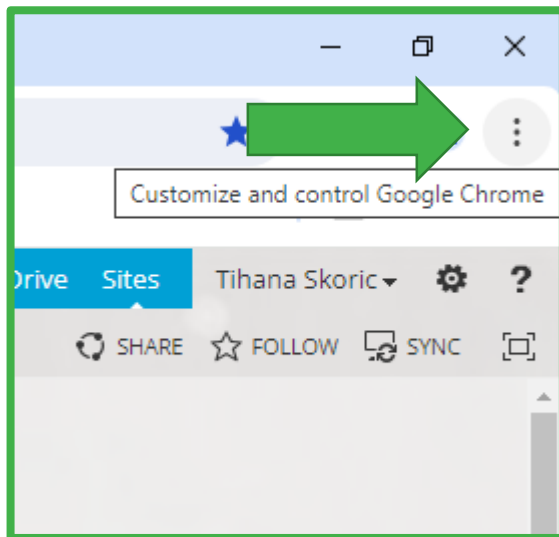


*\*Example shown in Chrome.*

- Select the bookmark feature in your browser to add a new bookmark
- When prompted, select “Done”
- Select “Edit” to rename your bookmark (ex. YWHO Files Library)

# Quick Tip: Desktop Shortcut

- To create a shortcut, select the menu in your browser
- Select the "Save & Share", then choose the "Create Shortcut"



- Name the shortcut, and click "Create"
- Your shortcut will now appear on your desktop



*\*Example shown in Chrome.*

# YWHO Helpdesk

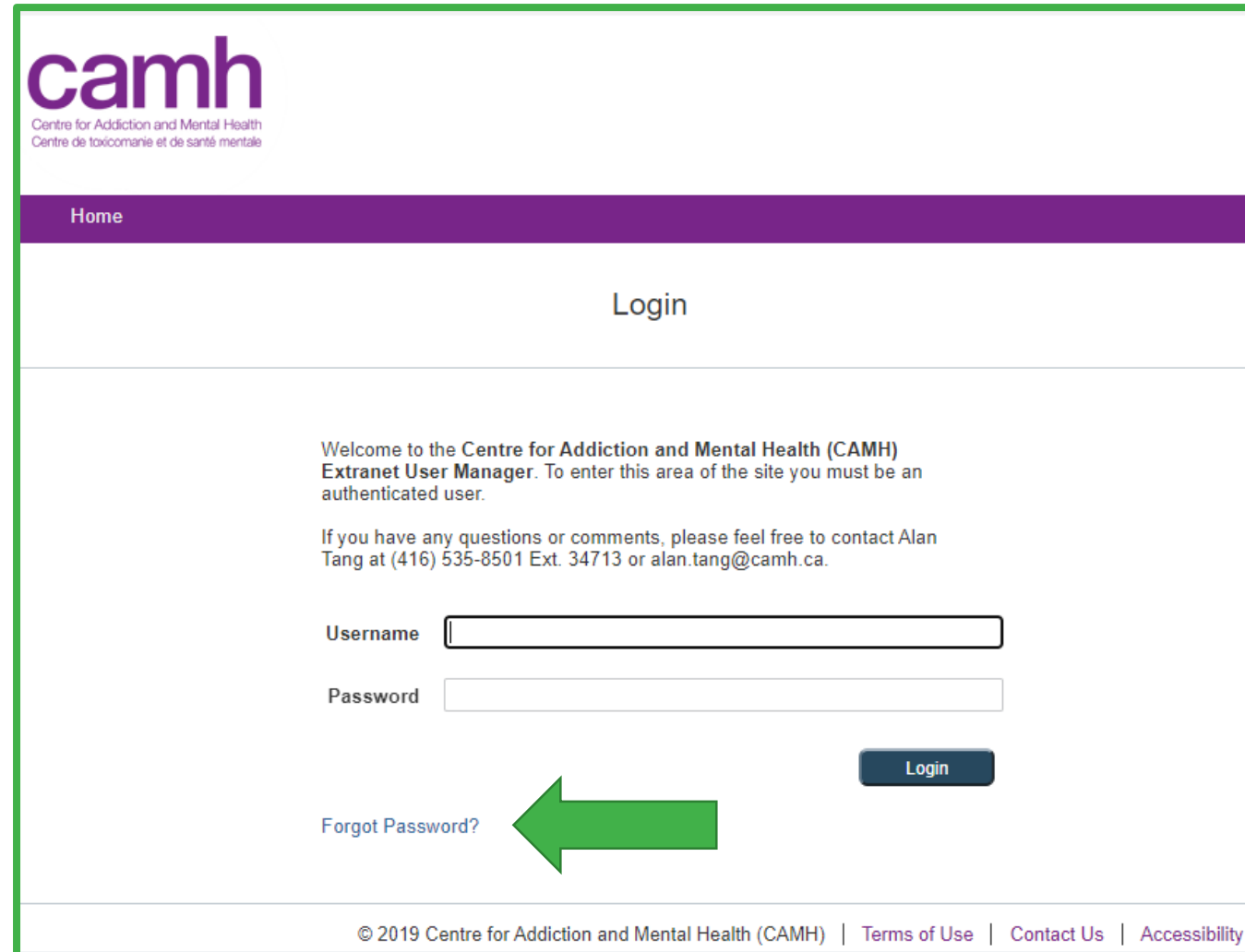
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- All SharePoint requests and support needs can be made through [YWHO Helpdesk](#).
  - Request to add/remove user accounts
  - Request changes to permission levels
  - Technical support and troubleshooting
- New users receive a temporary account set-up link from, no-reply@camh.ca. Please use the link to set up your account.

*\*Please check your junk folder for the temporary account set-up link.*

# Login Page

- To login, use the **camhx/firstname\_lastname** format and your password.
- If you forget your password, use the [Forgot Password](#) function to reset your credentials.
- Alternatively, submit a request through, [Helpdesk](#).



The screenshot shows the login page for the Centre for Addiction and Mental Health (CAMH) Extranet User Manager. At the top left is the CAMH logo with the text "Centre for Addiction and Mental Health" and "Centre de toxicomanie et de santé mentale". Below the logo is a purple navigation bar with the word "Home". The main heading is "Login". The page contains a welcome message: "Welcome to the Centre for Addiction and Mental Health (CAMH) Extranet User Manager. To enter this area of the site you must be an authenticated user." Below this is contact information for Alan Tang: "If you have any questions or comments, please feel free to contact Alan Tang at (416) 535-8501 Ext. 34713 or alan.tang@camh.ca." There are two input fields: "Username" and "Password". To the right of the "Password" field is a dark blue "Login" button. Below the "Password" field is a link for "Forgot Password?" with a large green arrow pointing to it from the right. At the bottom of the page is a footer with the text: "© 2019 Centre for Addiction and Mental Health (CAMH) | [Terms of Use](#) | [Contact Us](#) | [Accessibility](#)".

# Library Homepage

SharePoint Newsfeed OneDrive Sites Tihana Skoric

YOUTH WELLNESS HUBS ONTARIO CARREFOURS BIEN-ÊTRE POUR LES JEUNES

## Youth Wellness Hubs Ontario

Backbone Documents Archive Documents - YWHO PO EDIT LINKS

Search this site

### YWHO Network Partners Documents

+ new document or drag files here

All Documents Find a file

Name	Modified	Modified By	Checked Out To
Archive	January 25	Tihana Skoric	
Communities of Practice	April 30	Tihana Skoric	
Contact List	February 7	Tihana Skoric	
FREEDCan_EIED	December 14, 2023	Tihana Skoric	
Hub Manager Resources	January 31	Tihana Skoric	
Hub_Algonia Region	January 10, 2023	MOSS Admin	
Hub_Chatham-Kent	November 12, 2018	Heather McLaughlin	
Hub_East Toronto	November 12, 2018	Heather McLaughlin	
Hub_Eastern Champlain	November 12, 2018	Heather McLaughlin	
Hub_Haliburton County	November 12, 2018	Heather McLaughlin	
Hub_Kenora	November 12, 2018	Heather McLaughlin	
Hub_KFLA Regions	January 25	Tihana Skoric	
Hub_London-Middlesex	January 10, 2023	MOSS Admin	
Hub_Malton	November 12, 2018	Heather McLaughlin	
Hub_Niagara Region	November 12, 2018	Heather McLaughlin	
Hub_North Simcoe	November 12, 2018	Heather McLaughlin	

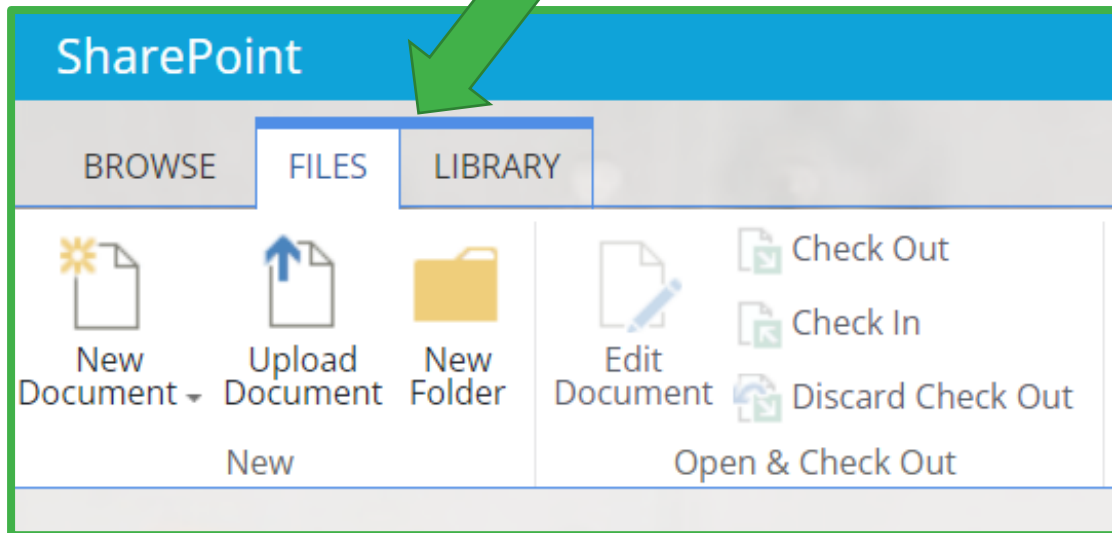
*\*Users will only see folders they have permission to view.*



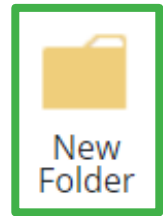
# Tool Menu

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- To open the YWHO SharePoint menu, click “Files” or “Library” tabs (top left of the Library Homepage)

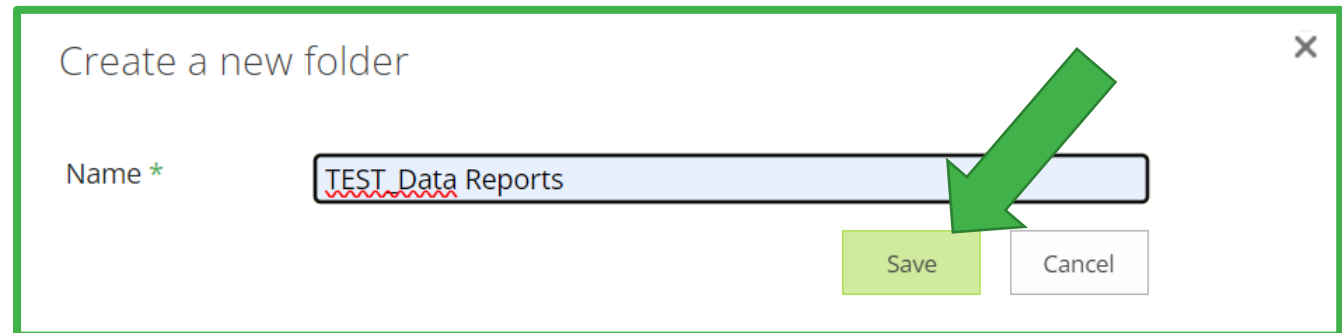
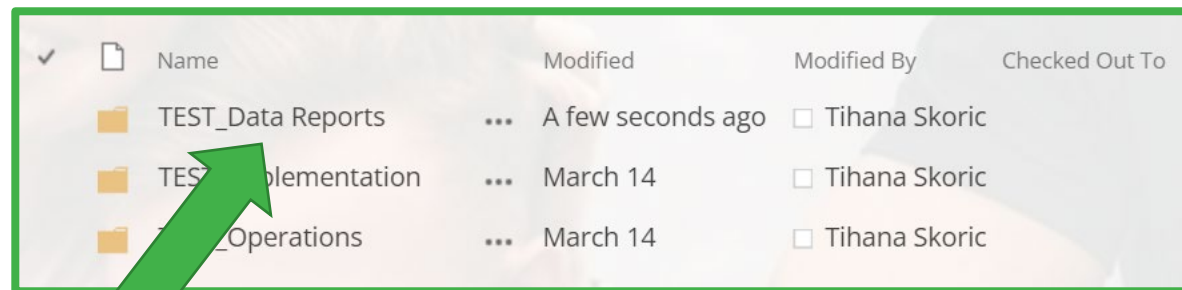


# New Folder



- To create a new folder, click “New folder” button from the menu

- Name your folder, then select “Save”

A screenshot of a "Create a new folder" dialog box. The title bar says "Create a new folder" with a close button (X) on the right. Below the title, there is a label "Name \*" followed by a text input field containing "TEST\_Data Reports". A green arrow points to the "Save" button, which is highlighted in green. To the right of the "Save" button is a "Cancel" button. The dialog box is enclosed in a green border.A screenshot of a folder list table. A green arrow points to the "TEST\_Data Reports" folder. The table has columns for Name, Modified, Modified By, and Checked Out To. The "TEST\_Data Reports" folder is the first entry in the list.

✓	📁	Name	Modified	Modified By	Checked Out To
		TEST_Data Reports	... A few seconds ago	<input type="checkbox"/> Tihana Skoric	
		TEST_Implementation	... March 14	<input type="checkbox"/> Tihana Skoric	
		TEST_Operations	... March 14	<input type="checkbox"/> Tihana Skoric	

- Once saved, the new folder will populate in the list of existing folders

*\*Please see appendix page for SharePoint naming conventions.*

# New Folder Permissions

- Folders inherit permissions from the “parent” folder
- To change permission levels of folders, please submit a request to [Helpdesk](#)

*\*A parent folder is the main group folder, usually a hub group folder or project folder.*



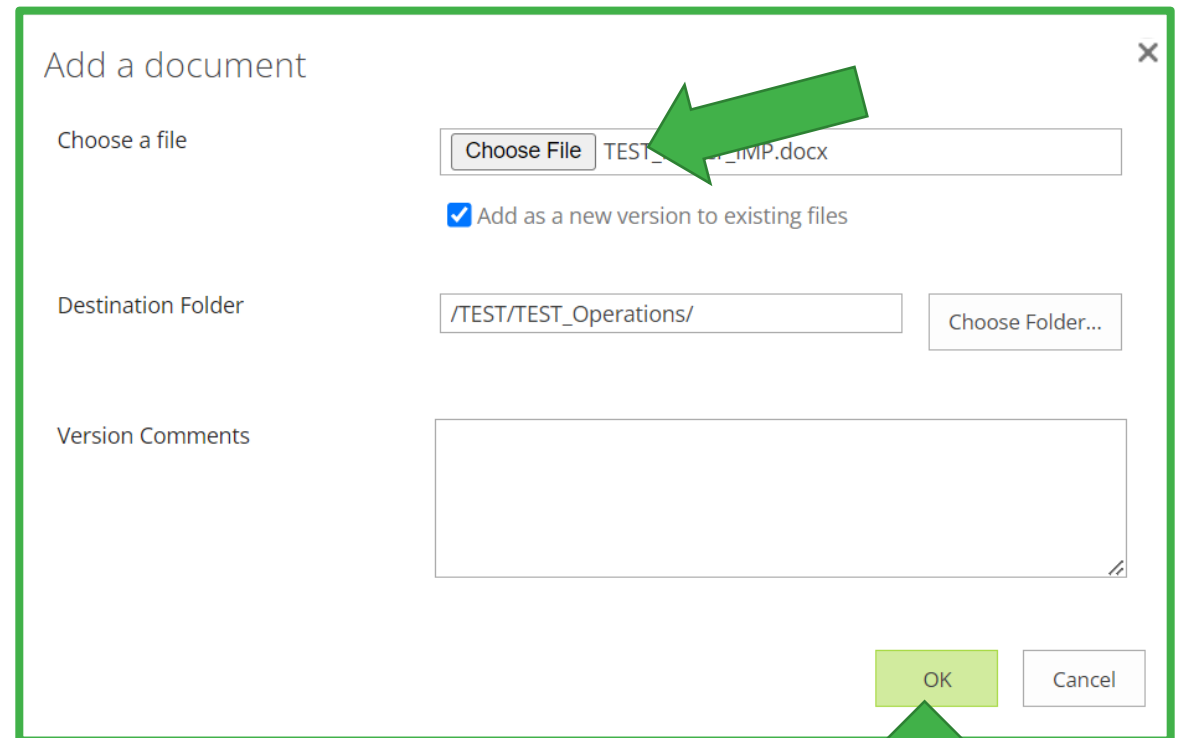
# Upload Files

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YWHO Network Partners Documents

 new document or drag files here

- To upload a file, select “new document” option
- Choose a file from your computer, then select “OK”
- You can also drag and drop files in the “new document” space



Add a document

Choose a file  TEST\_...\_TMP.docx

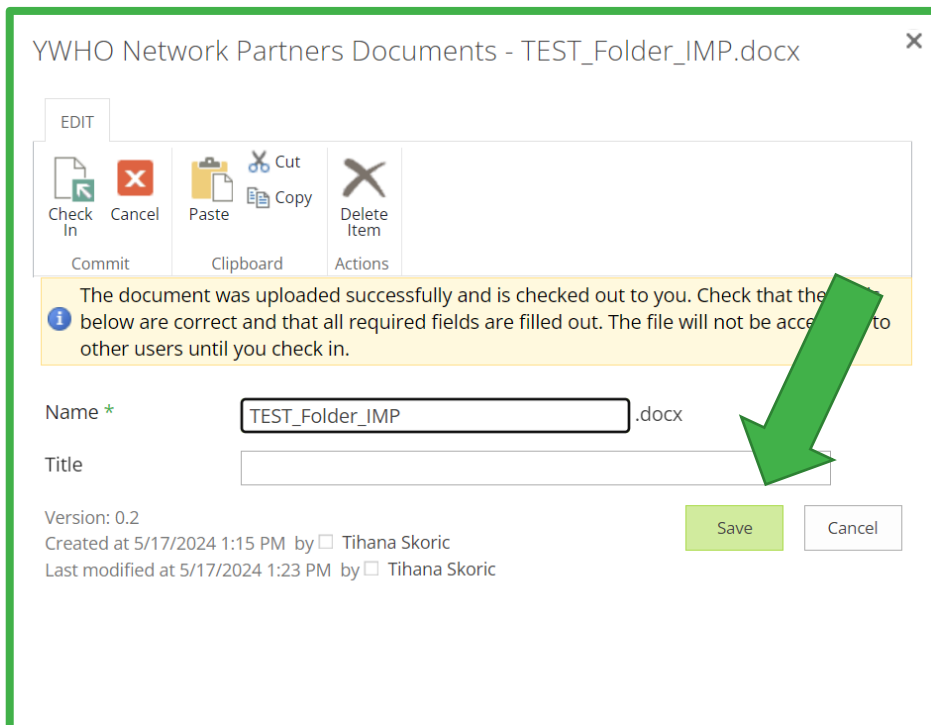
Add as a new version to existing files

Destination Folder

Version Comments

# Upload Files (Cont'd)

- Select “Check in” or “Save” to ensure your file is uploaded
- You must “Check in” a file before uploading, otherwise team members will not see the file



YWHO Network Partners Documents - TEST\_Folder\_IMP.docx

EDIT

Check In Cancel Paste Cut Copy Delete Item

Commit Clipboard Actions

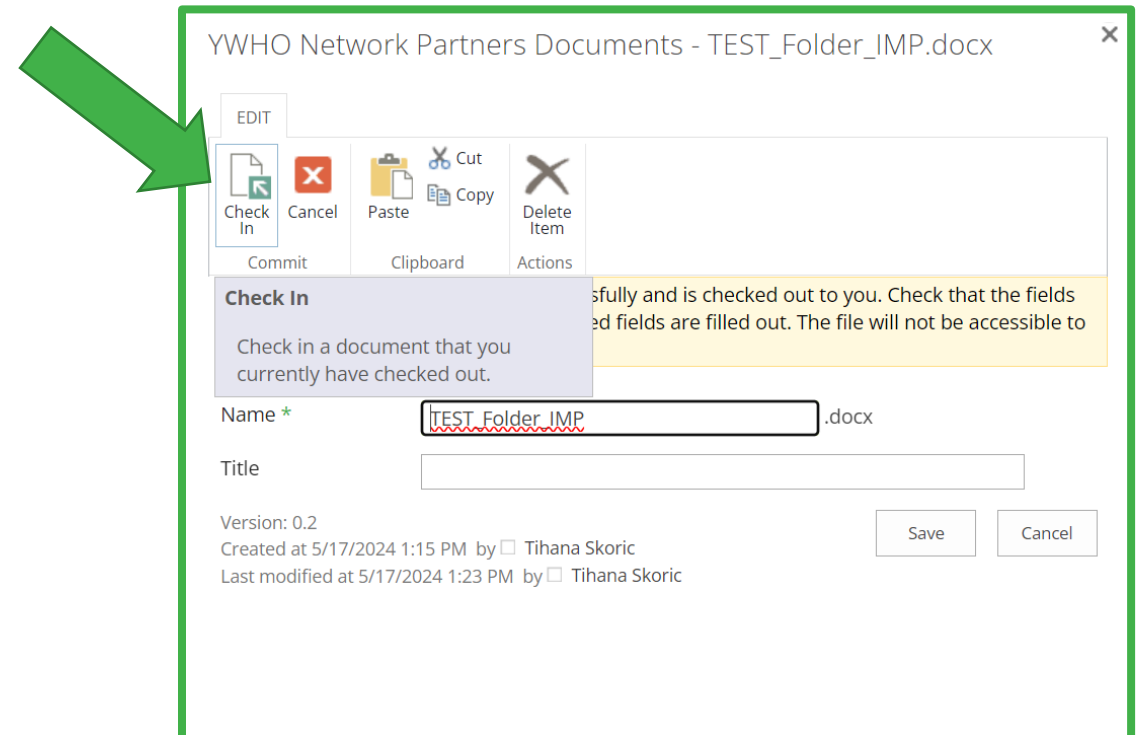
The document was uploaded successfully and is checked out to you. Check that the fields below are correct and that all required fields are filled out. The file will not be accessible to other users until you check in.

Name \* TEST\_Folder\_IMP.docx

Title

Version: 0.2  
Created at 5/17/2024 1:15 PM by  Tihana Skoric  
Last modified at 5/17/2024 1:23 PM by  Tihana Skoric

Save Cancel



YWHO Network Partners Documents - TEST\_Folder\_IMP.docx

EDIT

Check In Cancel Paste Cut Copy Delete Item

Commit Clipboard Actions

**Check In**

Check in a document that you currently have checked out.

The document was uploaded successfully and is checked out to you. Check that the fields below are correct and that all required fields are filled out. The file will not be accessible to other users until you check in.

Name \* TEST\_Folder\_IMP.docx

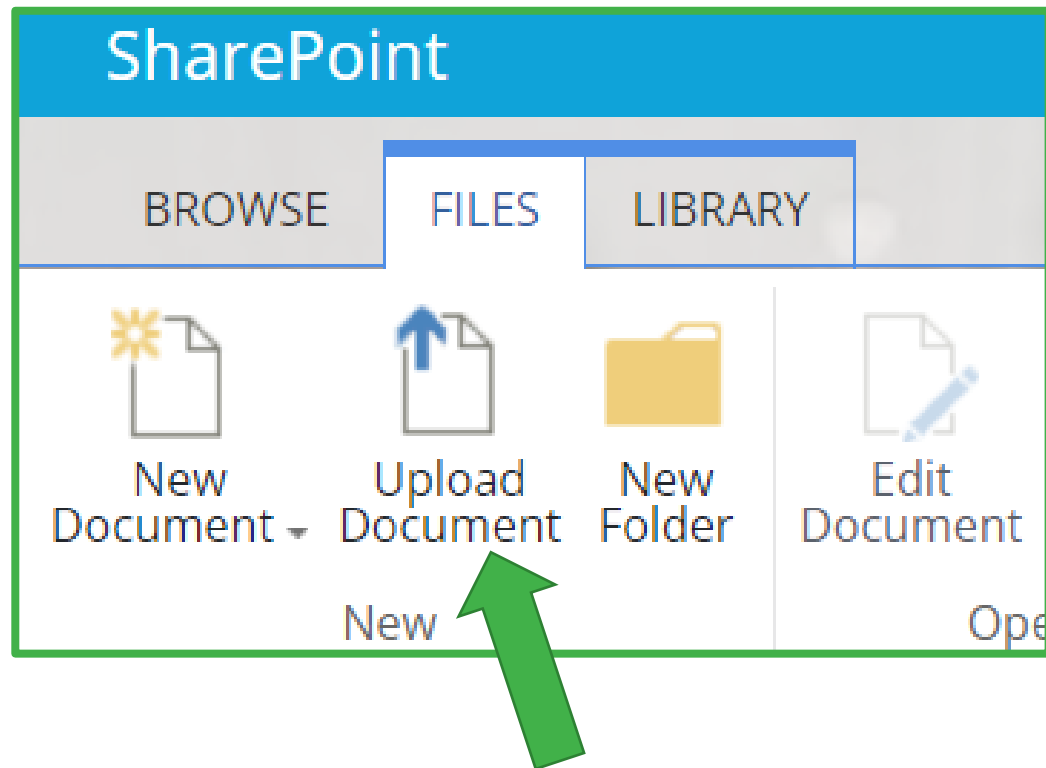
Title

Version: 0.2  
Created at 5/17/2024 1:15 PM by  Tihana Skoric  
Last modified at 5/17/2024 1:23 PM by  Tihana Skoric

Save Cancel

# Upload Files (Cont'd)

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- Additionally, you can also upload a new document through the menu tab
- Select “Upload Document”, and follow the same upload process as previously shown

*\*A reminder to always “Check in” the file before uploading.*

# New File Permissions



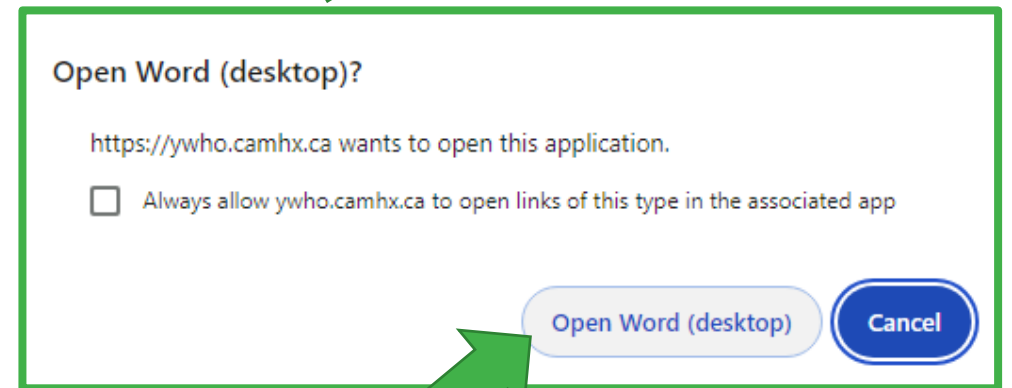
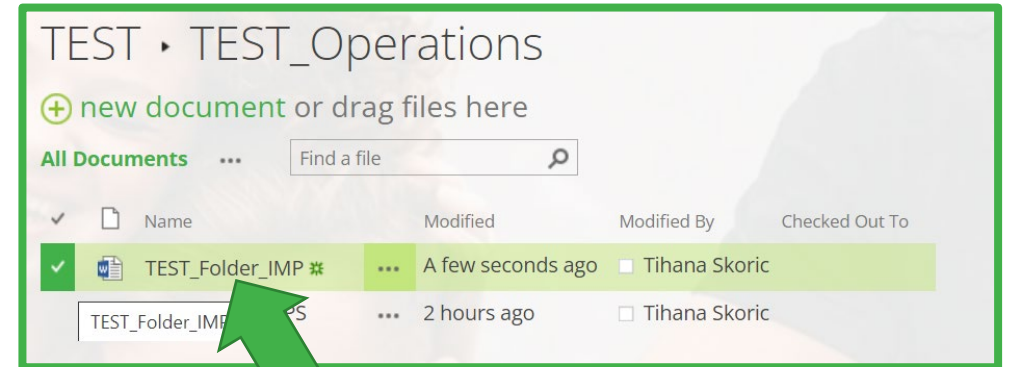
- As with new folders, new files inherit permissions from the “parent” folder
- To change permission levels of files, please submit a request to [Helpdesk](#)

ywho

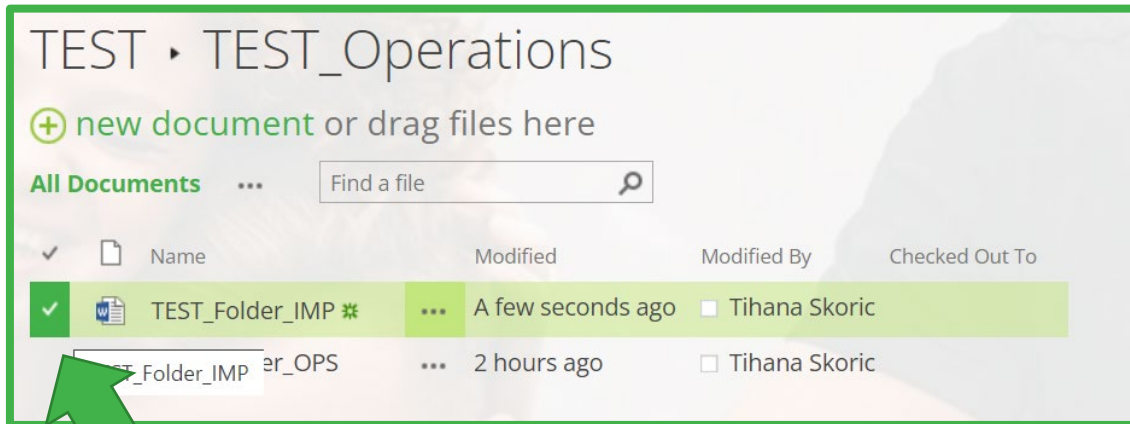
*\*A parent folder is the main group folder, usually a hub group folder or project folder.*

# View Files

- To view a file, click the name of the file from the file list
- When prompted, select to open the file from the file application, (ex. Open Word)
- If you would like to make edits to a file, you will need to check out the file to enable editing

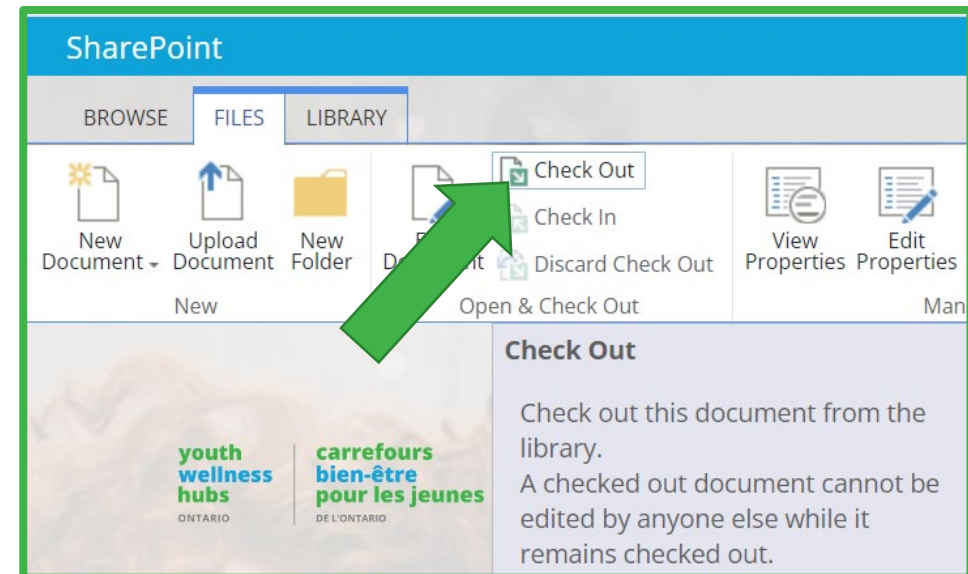


# Check Out Files

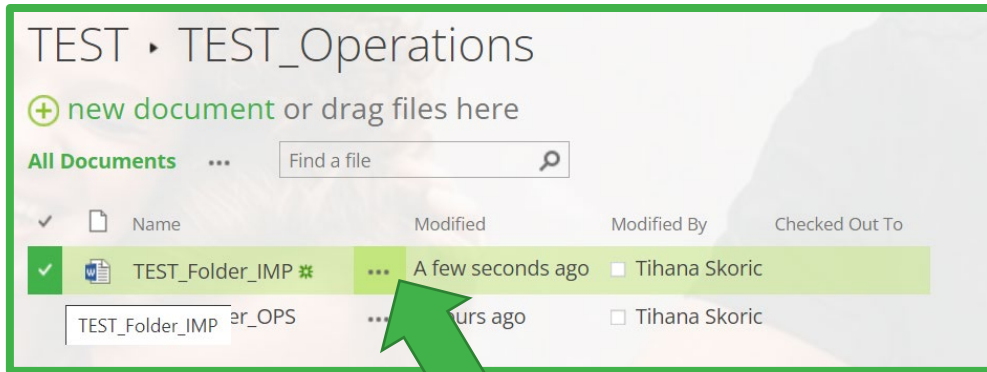


- To check out a file, select the check mark next to the file you wish to check out
- Then select “Check Out” form the tool menu

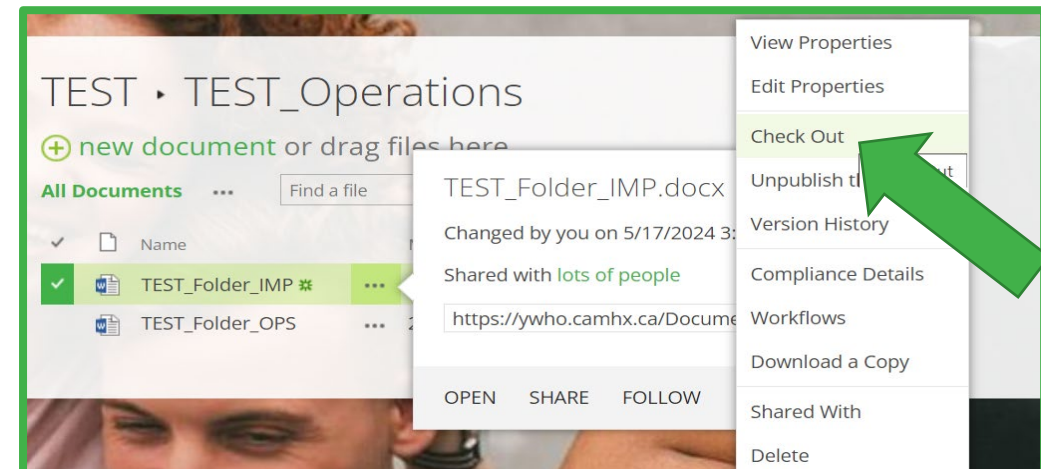
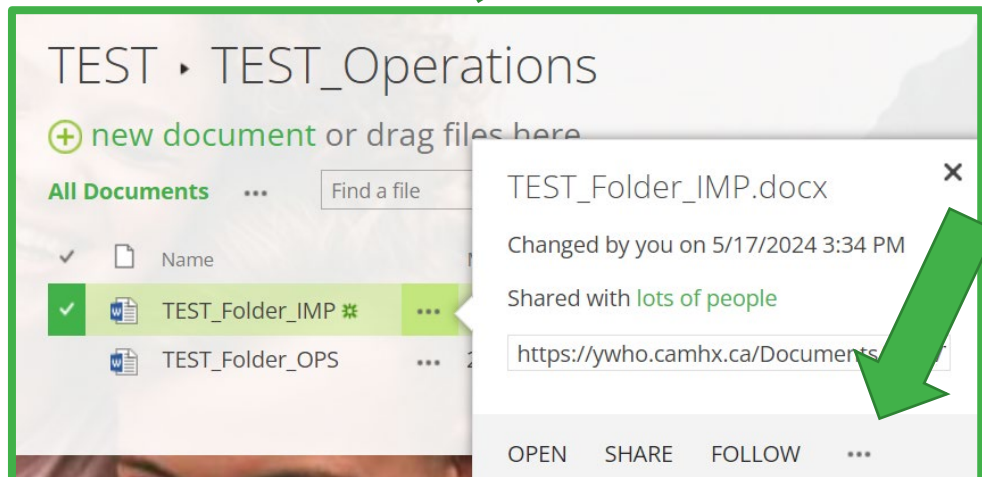
- A checked out document is unavailable to other users
- This enables users to lock access to a document while making edits



# Check Out Files (Cont'd)



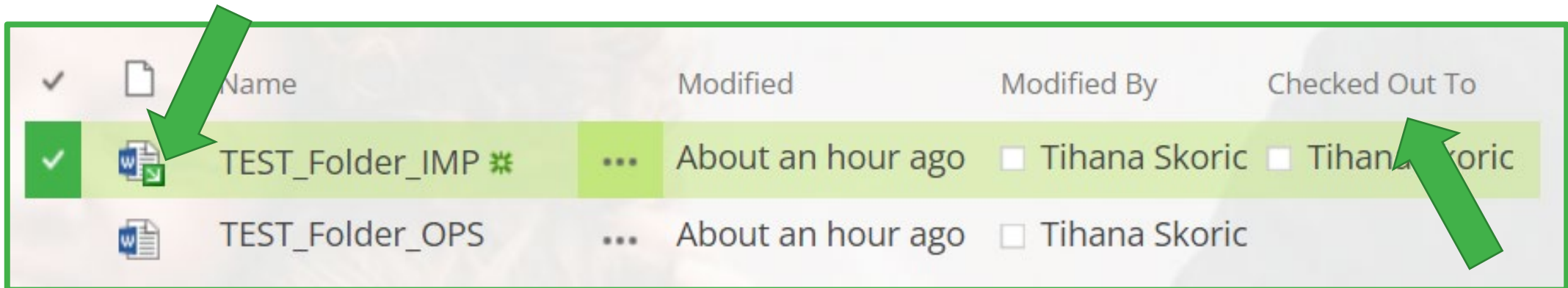
- Alternatively, you can open the menu from the ellipses located next to the file name
- Select the ellipses again to open the menu, then select “Check Out”



# Check Out Files (Cont'd)

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- A checked out file will have a green arrow in the file icon
- Only one user can “check out” a document at a given time

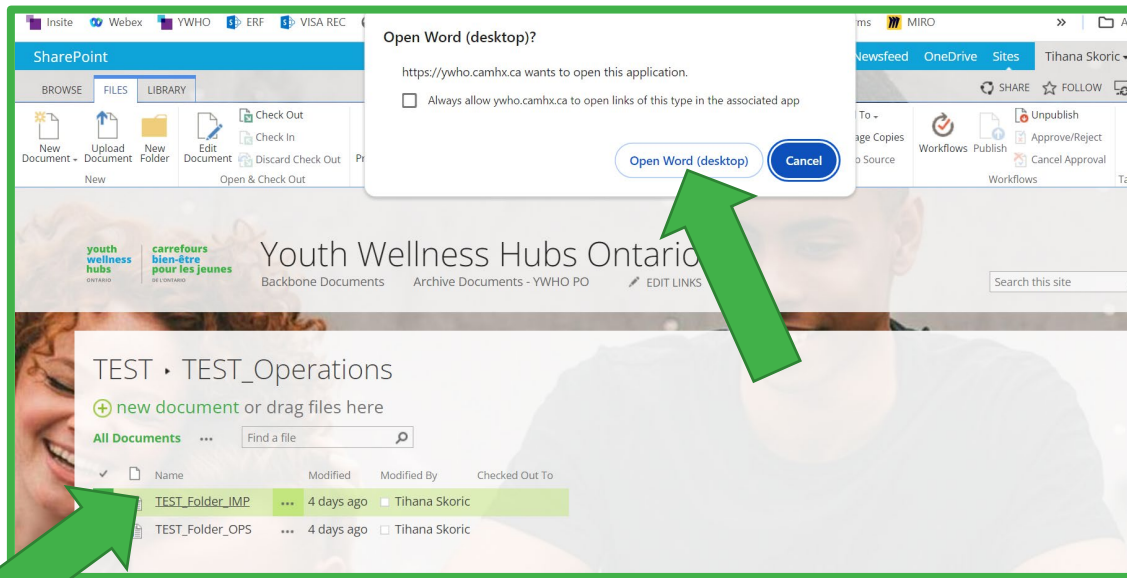


✓	Name	Modified	Modified By	Checked Out To
✓	TEST_Folder_IMP ✖	About an hour ago	<input type="checkbox"/> Tihana Skoric	<input type="checkbox"/> Tihana Skoric
	TEST_Folder_OPS	About an hour ago	<input type="checkbox"/> Tihana Skoric	

- The “Checked Out To” column lists the name of the user who last checked out the file

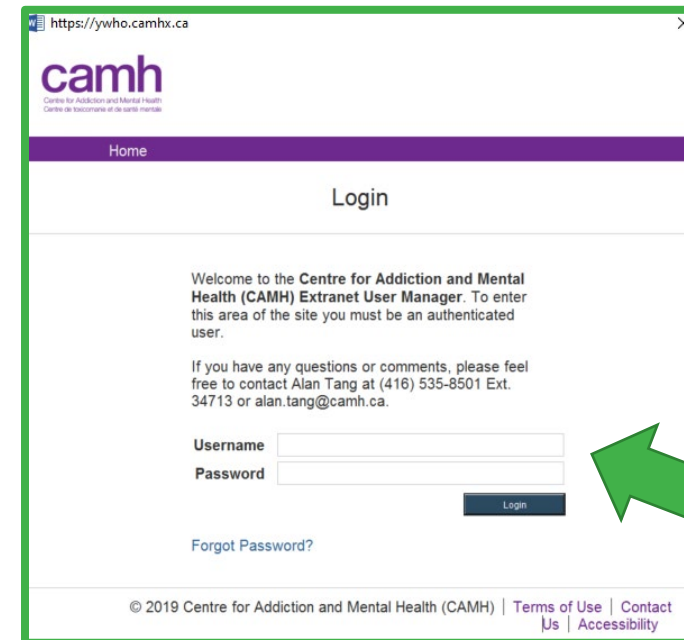
*\*Request support from [Helpdesk](#) to override checked out files. Please note this can lead to loss of unsaved work.*

# Edit Files

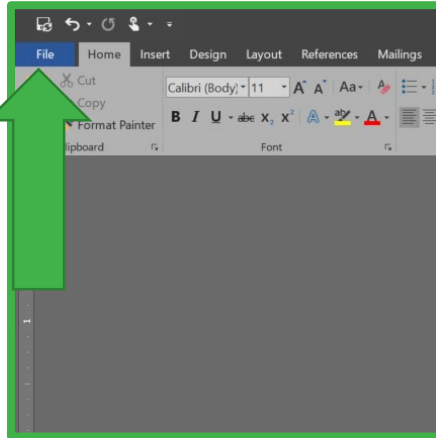


- When prompted, validate your credentials in order to view the file

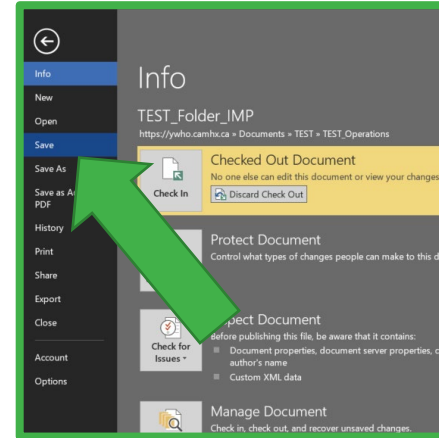
- To edit a file, select the file, then select “Open Word” or “Open Excel” option



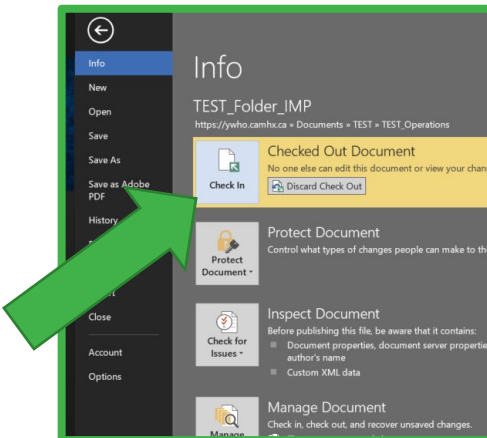
# Edit Files (Cont'd)



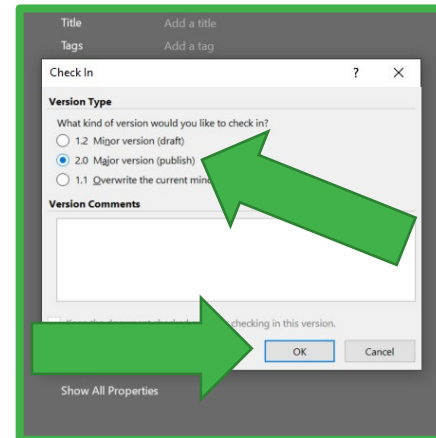
**Step 1:**  
Open "files" menu  
in Word or Excel  
to "save" your  
work



**Step 2:**  
Always "Save"  
your work  
before closing  
the file



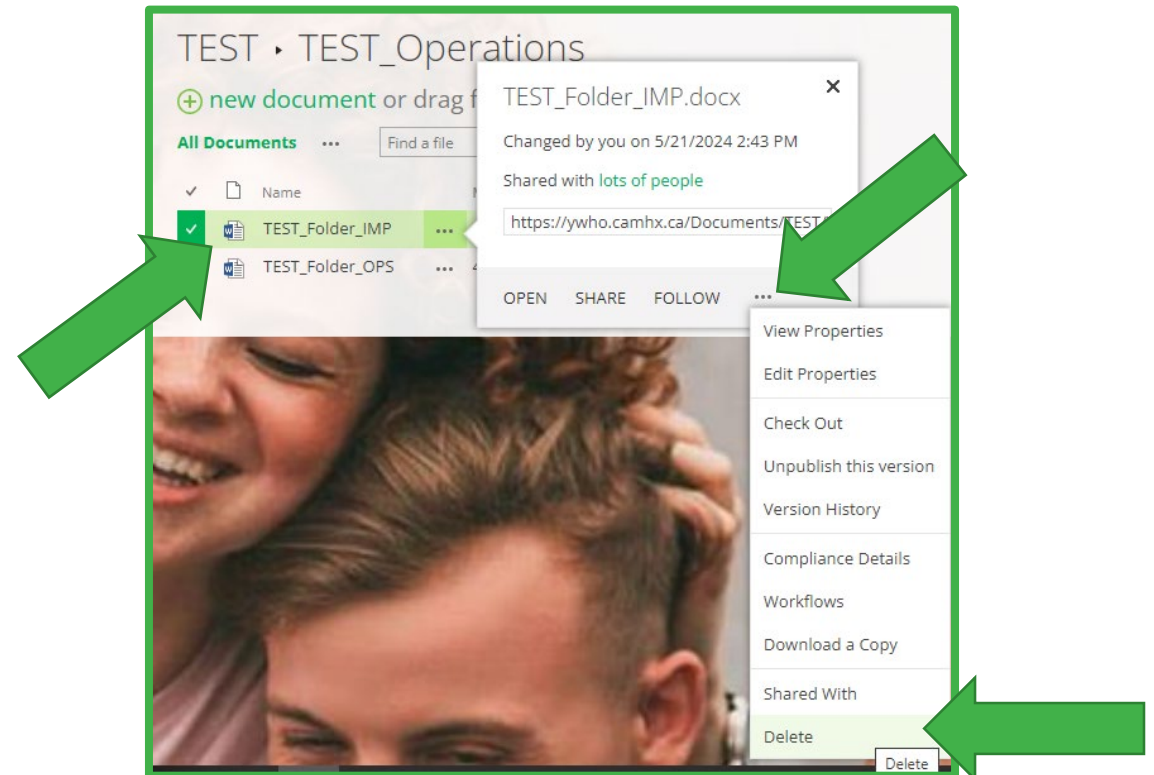
**Step 3:**  
Select "Check in"  
when your edit is  
complete



**Step 4:**  
Select "2.0 Major Version  
(publish)," then select  
"OK"  
Close the edited file

# Delete File or Folder

- Occasionally, you may need to delete a file/folder (ex. File/folder cleaning)
- To delete a file, select the file/folder you wish to delete, then click the ellipses to open the file/folder menu
- Click the ellipses to open the drop menu
- Then select “Delete”
- When prompted select “OK”



# SharePoint User Account Cleaning



- SharePoint account clean-up occurs quarterly
- YWHO PO will send a list of users for each Network to review
- Network Leads will flag required changes

*\* Submit a request to [Helpdesk](#) to add/remove user accounts in advance of the quarterly clean-up.*

# Summary

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- **YWHO SharePoint allows teams to share information and collaborate**
- **Users can upload, view and edit files**
- **Individual users have different permission levels**
- **Connect with [Helpdesk](#) to request a new YWHO SharePoint account or for troubleshooting**
- **For additional supports, please reach out to [techsupport@ywho.ca](mailto:techsupport@ywho.ca)**

# Appendix: SharePoint Naming Conventions

Illegal Folder or Filename Character	Action	Result/remarks
Leading Space	<i>Remove</i>	Replace with _(underscore)
Trailing Space	<i>Remove</i>	Replace with _(underscore)
<b>tilde ~</b>	<i>Replace</i>	Replace with -(dash)
<b>double quote "</b>	<i>Replace</i>	Replace with ' (single quote)
<b>pound #</b>	<i>Replace</i>	Replace with -(dash)
<b>percent %</b>	<i>Replace</i>	Replace with 'p-c'
<b>ampersand &amp;</b>	<i>Replace</i>	Replace with ' and'
<b>asterisk *</b>	<i>Replace</i>	Replace with -(dash)
<b>colon :</b>	<i>Replace</i>	Replace with -(dash)
<b>less than &lt;</b>	<i>Replace</i>	Replace with ((left bracket)
<b>greater than &gt;</b>	<i>Replace</i>	Replace with )(right bracket)
<b>question mark ?</b>	<i>Replace</i>	Replace with -(dash)
<b>forward slash /</b>	<i>Replace</i>	Replace with --(dash)
<b>back slash \</b>	<i>Replace</i>	Replace with -- (dash)
<b>left brace {</b>	<i>Replace</i>	Replace with ((left bracket)
<b>pipe  </b>	<i>Replace</i>	Replace with -(dash)
<b>right brace }</b>	<i>Replace</i>	Replace with )(right bracket)

***\*If file name error persists, refer to file owner as to preferred course of action.***

***\*Renaming files and folders may break scripts and macros that rely on these. End user will need to review and update documents to reinstate functionality in these cases.***