

Admin Guide.

Installation
And Activation



ShortPoint SPFx Installation and Activation for Office 365 (SharePoint Online).

ENVIRONMENT

This guide is for Office 365
(SharePoint Online) users

SHORTPOINT SPFx VERSION

This guide is suitable for installing
ShortPoint SPFx version 7.x.x.x
and higher

Version 1.2

Magdalene Mojica
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Section 1

Before We Begin

This section discusses the required permissions you will need before you proceed with the installation process. Follow the instructions carefully to get started.

1.1 Required Permissions

You must have the necessary permissions before installing ShortPoint. These permissions are **Global Office 365 Admin** and **Site Collection Administrator** for the Site Collection you are trying to install ShortPoint SPFx on.

1.1.1 Global Office 365 Admin

You need to be a Global Office 365 Admin to create and/or use an App Catalog. The App Catalog is where you will upload the ShortPoint SPFx file. To check if you have the permissions, use this URL: <https://tenantname-admin.sharepoint.com>. Replace **tenantname** with the name of your tenant.

For example, contoso is your tenant's name. The URL will be rewritten as <https://contoso-admin.sharepoint.com>.

If you are redirected to the SharePoint admin center, it means that you are the Office 365 Global Admin. You can now proceed to **section 1.2.2**. Otherwise, you will not be able to access the page. Contact your IT department to help you upload ShortPoint SPFx to the App Catalog.

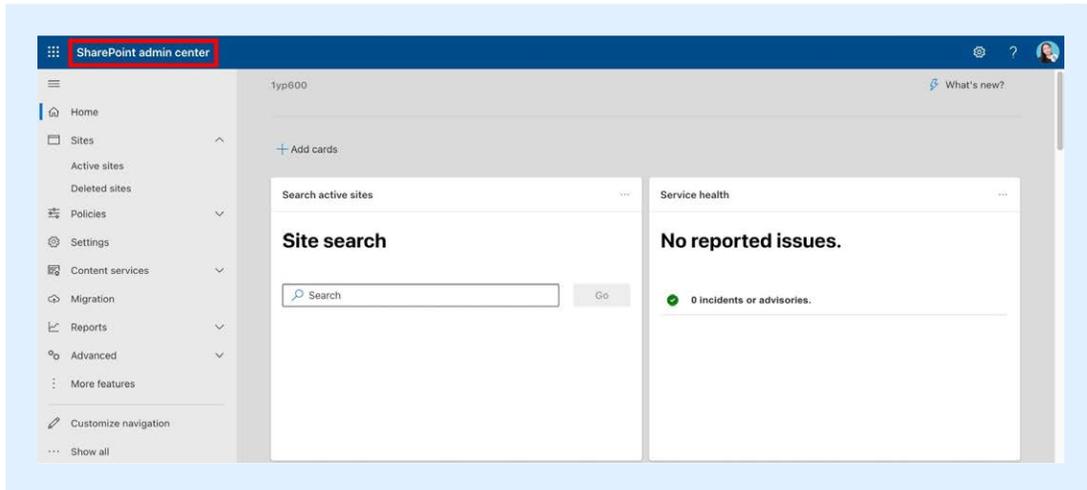


Figure 1.1.1.1 SharePoint Admin Center page

1.1.2 Site Collection Administrator

You need to be a Site Collection Administrator. To check, go to your SharePoint Admin Center and select **Active Sites** from the side panel.

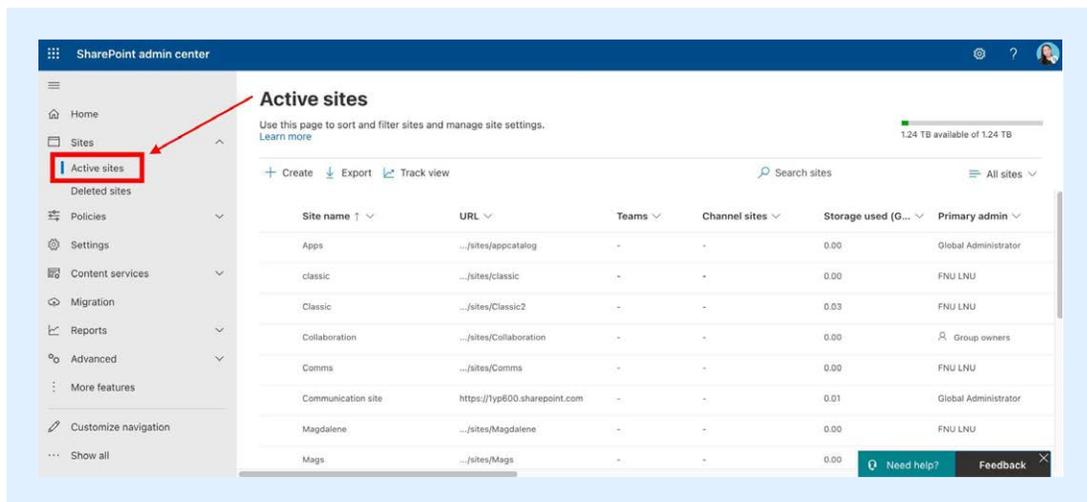


Figure 1.1.2.1 Active Sites page

Once there, select the Site Collection where you want ShortPoint to be installed. Under the **Permissions** tab, look for your name from the list of Site admins. If you are not listed, this means that you are not a Site Collection Administrator. Reach out to any of the administrators to grant you admin access.

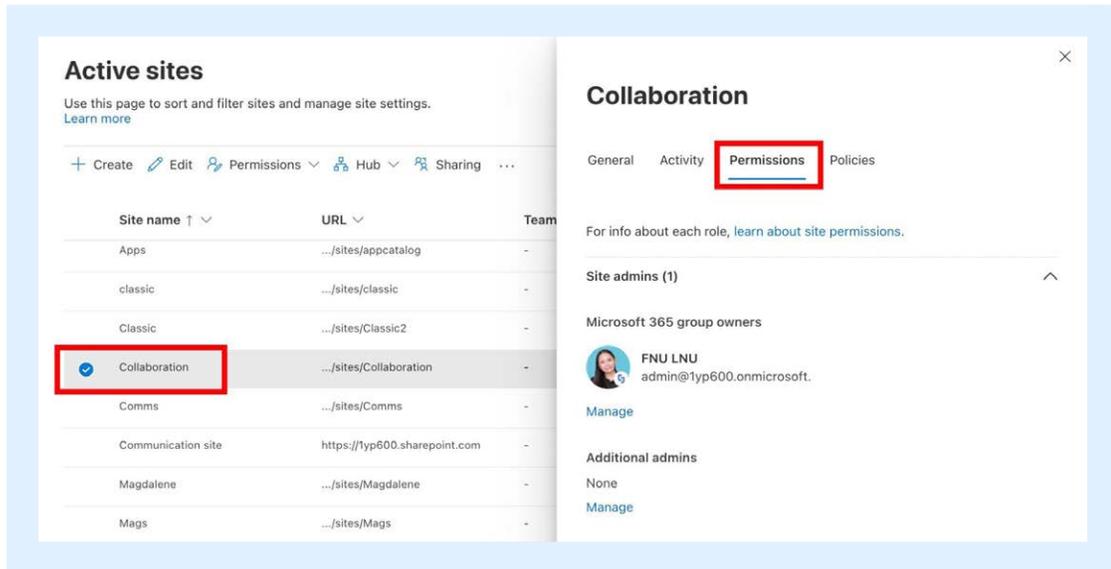


Figure 1.1.2.2 Permissions tab

Section 2

Pre-Installation

This section details all the prerequisites you will need to install ShortPoint. This includes submitting the ShortPoint trial request and extracting the latest ShortPoint SPFx version.

2.1 Submit the ShortPoint Trial Request

To access our trial page, go to <https://www.shortpoint.com/> and select **Download** at the top right corner.

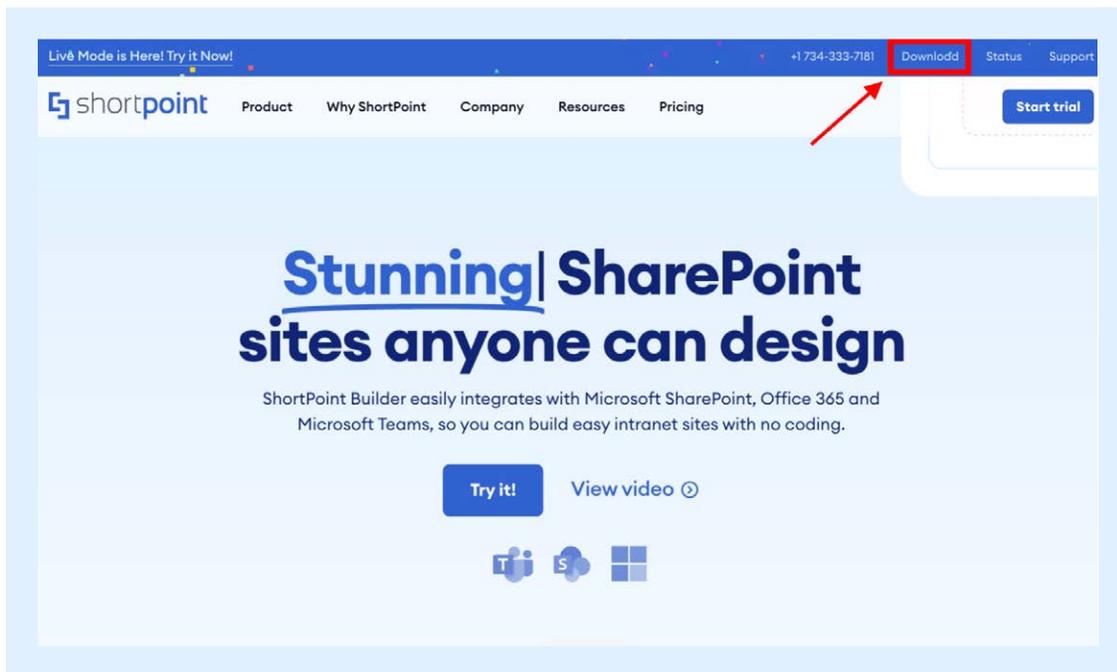


Figure 2.1.1 Download button

Scroll down and choose **Office 365**.

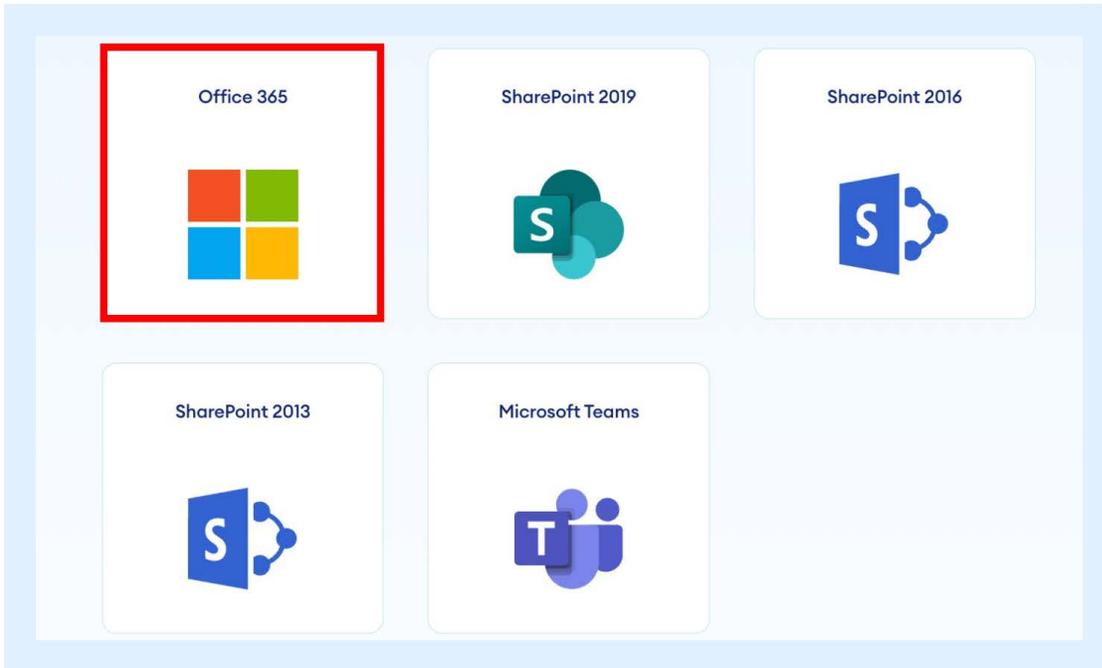


Figure 2.1.2 Office 365

Click **Download ShortPoint SPFx for Office 365**.



Figure 2.1.3 Download button

Select if you are a new or an existing customer.

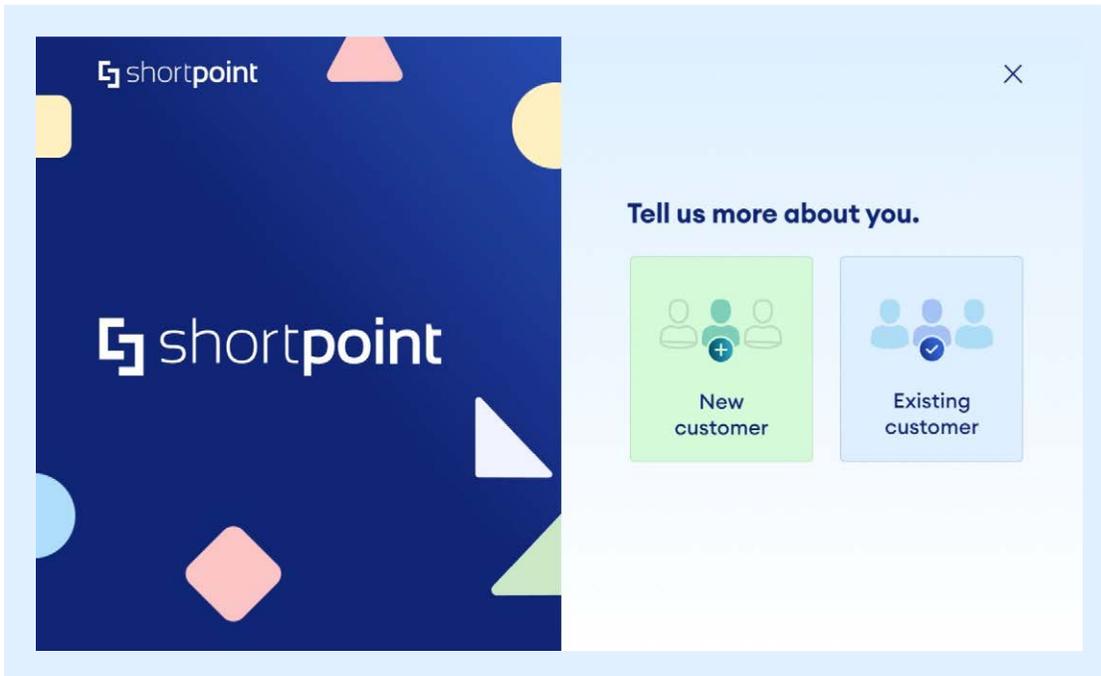


Figure 2.1.4 New or Existing customer selection

Fill in the trial request form

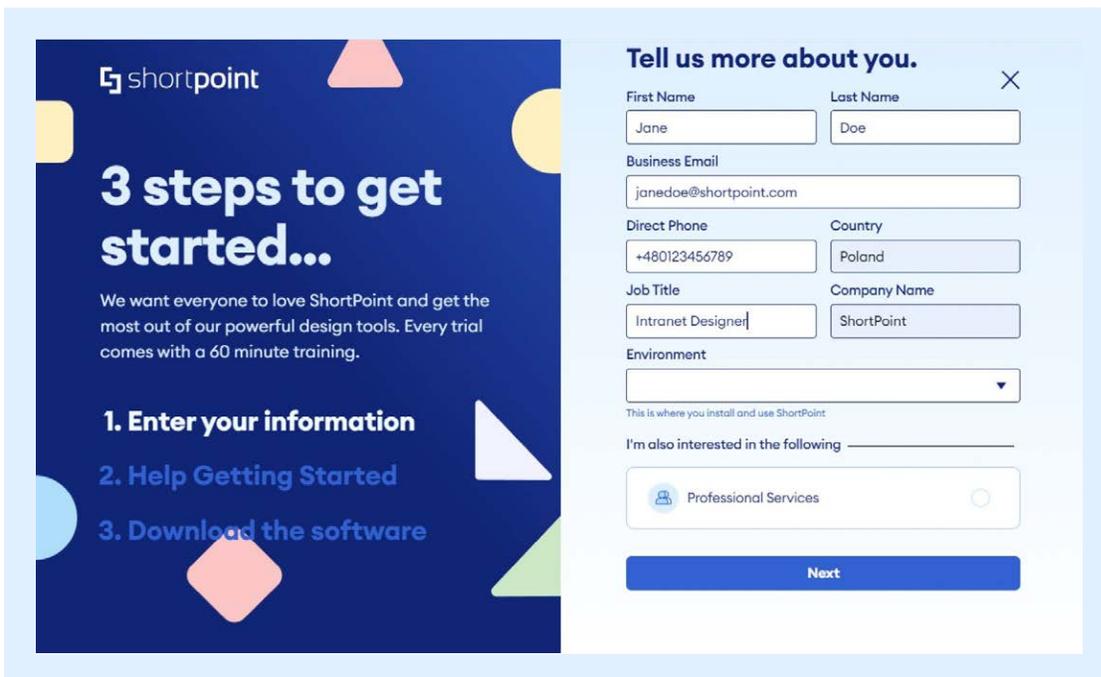


Figure 2.1.5 Trial request form

From the **Environment** drop-down, select **Office 365**.

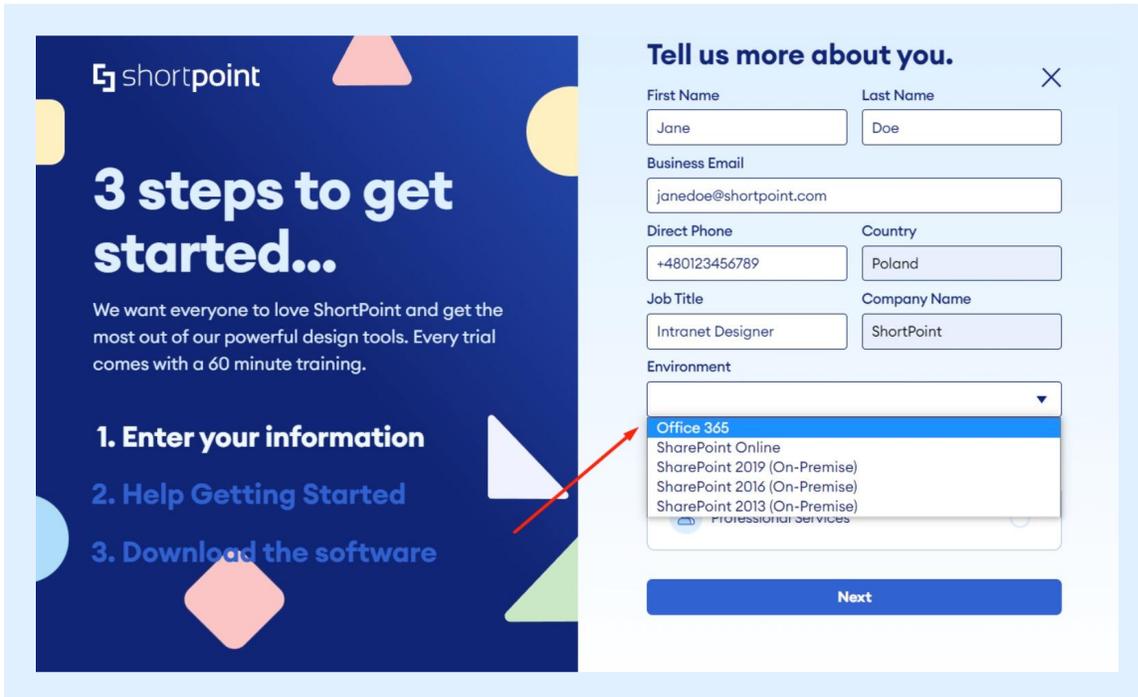


Figure 2.1.6 Environment drop-down

Indicate the URL of your SharePoint tenant

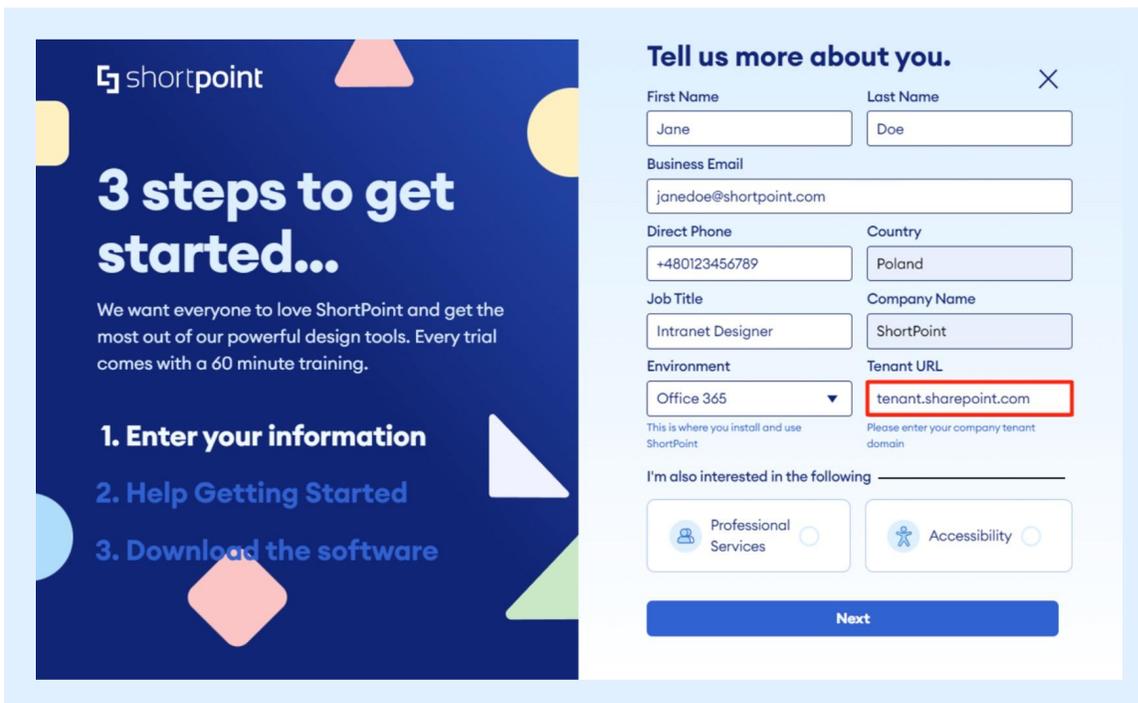


Figure 2.1.7 Tenant URL box

Let us know if you are interested in [Professional Services](#) or [Accessibility](#) for your intranet. Then, click **Next**.

Figure 2.1.8 Professional Services and/or Accessibility selection

Every new trial comes with a 60-minute walkthrough demo session with one of our experts. If you would like to have it, select a **date**.

Figure 2.1.9 Date of walkthrough session selection

And a **time slot**. Otherwise, you can click Schedule Later.

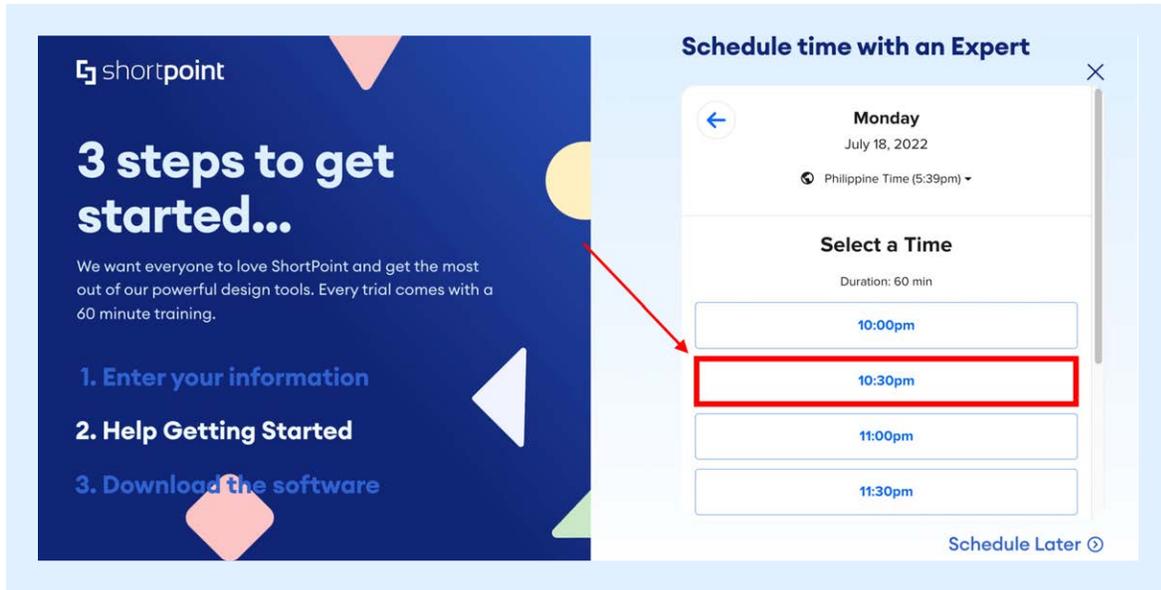


Figure 2.1.10 Time of walkthrough session selection

After selecting the date and time of the walkthrough, click **Confirm**.

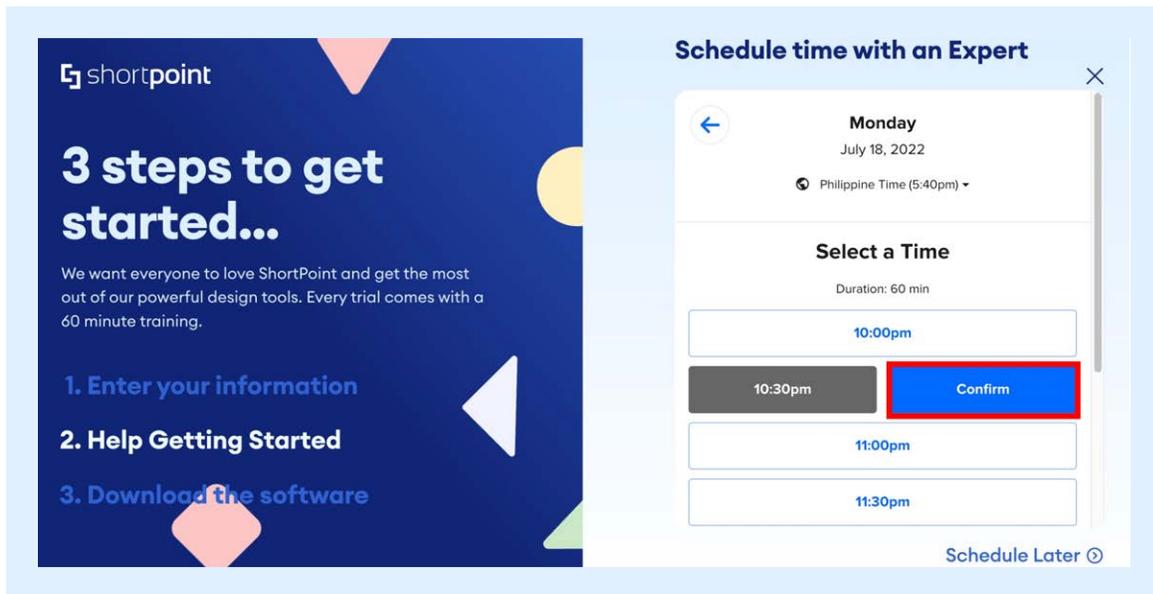


Figure 2.1.11 Confirm button

You can also indicate the emails of your colleagues to invite them to the walkthrough, as well as leave comments if you have any special requests. Then, click **Schedule Event**.

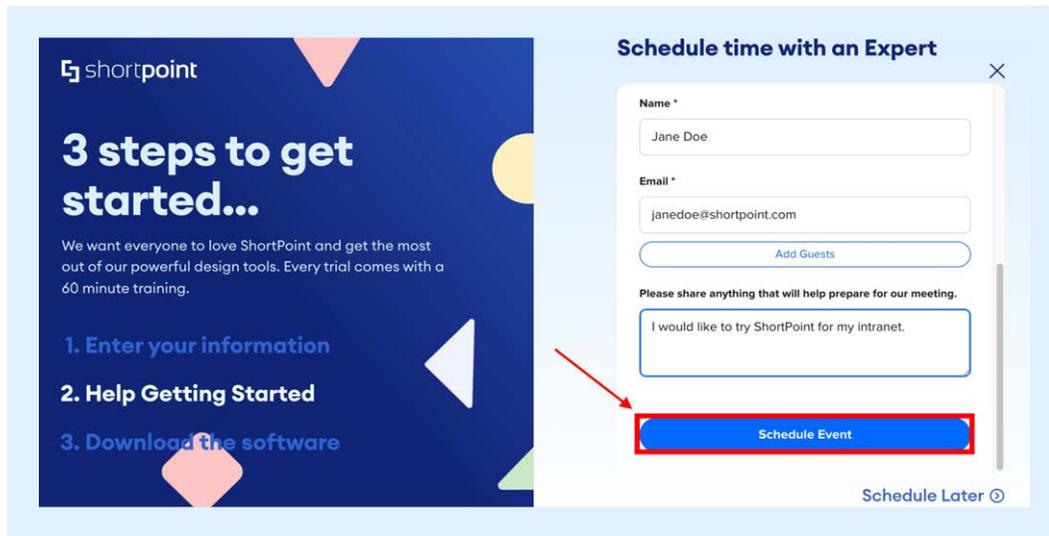


Figure 2.1.12 Schedule Event button

You will then be redirected to the Success page where you can download ShortPoint. Click **Download ShortPoint for SharePoint Online (Office 365)**.

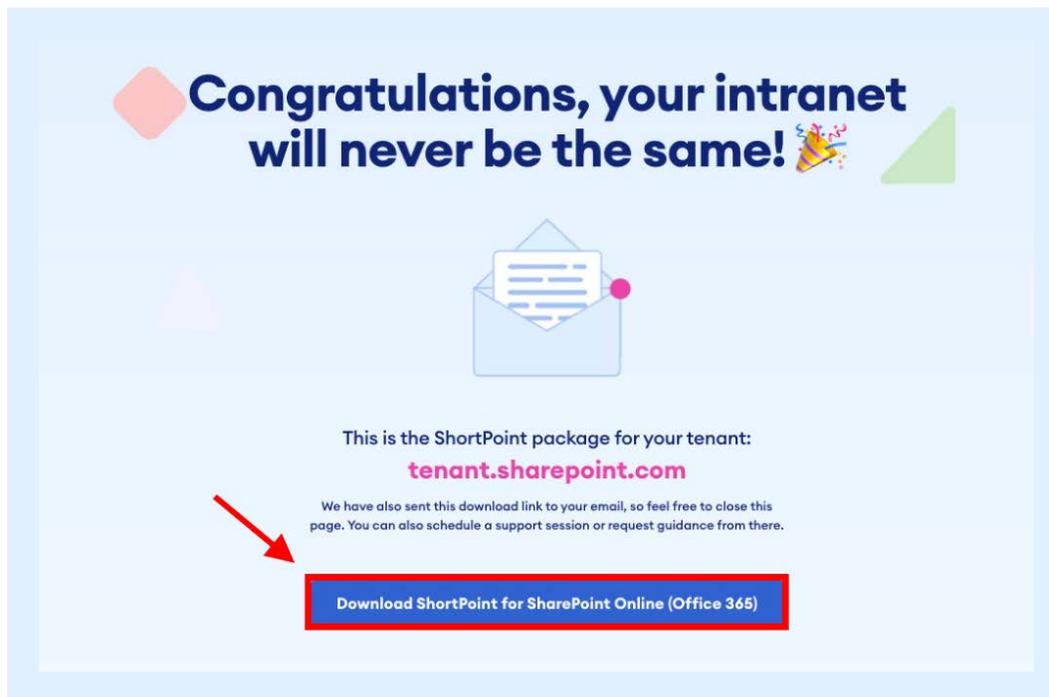


Figure 2.1.13 Download ShortPoint for SharePoint Online (Office 365) button

2.2 Extract the ShortPoint SPFx File

If you are using the Chrome browser, you will see a ZIP archive at the bottom of your screen after clicking the download button. If you are using another browser, look for the file in your downloads. Click the folder to open the file.

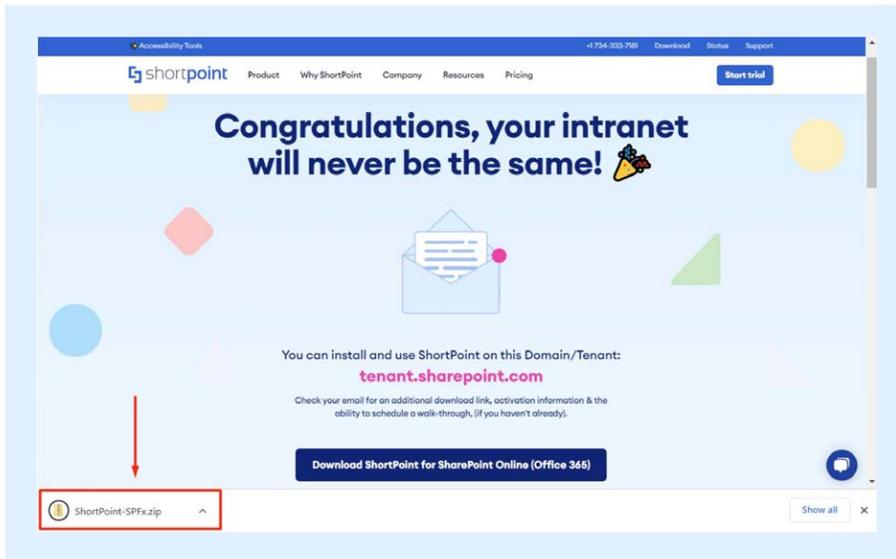


Figure 2.2.1 ShortPoint SPFX.zip file

You will see a readme.txt, a PDF installation guide, and the shortpoint-spfx.sppkg file in the ZIP archive. Click the **shortpoint-spfx.sppkg** file once to select it.

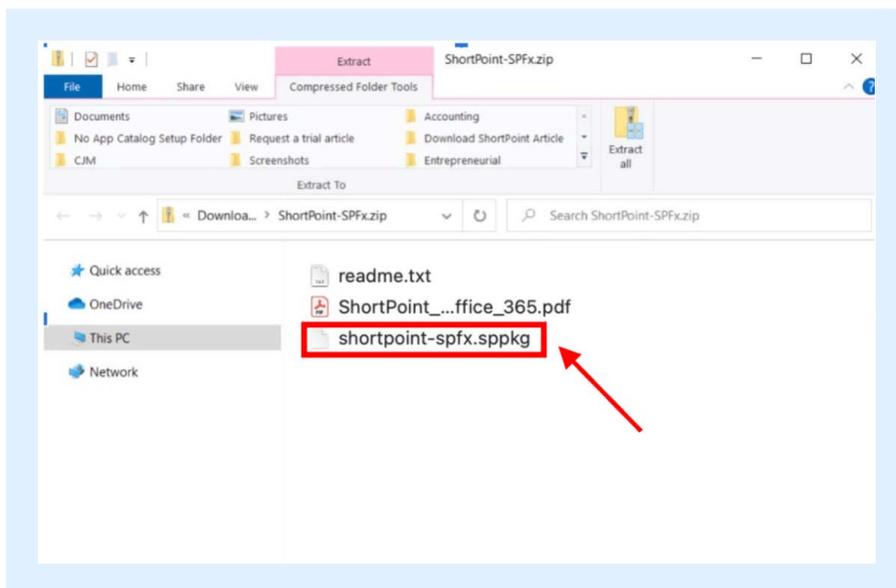


Figure 2.2.2 The shortpoint-spfx.sppkg file

On the top, under Compressed Folder Tools, select the folder where you want the *shortpoint-spx.sppkg* file to be extracted. This will extract the file to your selected folder.

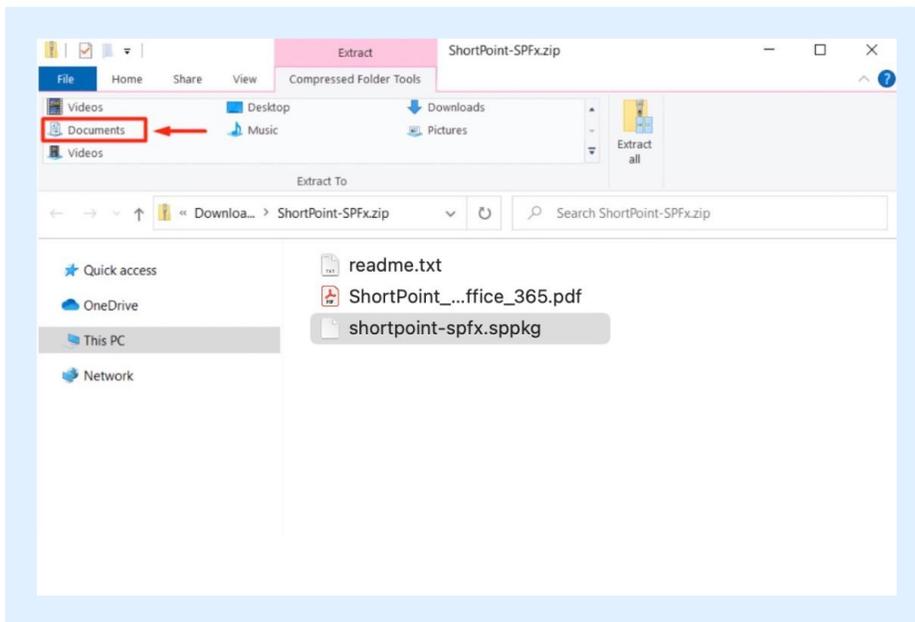


Figure 2.2.3 Selecting a folder to the extract shortpoint-spx.sppkg file

To make sure that the file is extracted properly, open the folder where you extracted the file and check if the *shortpoint-spx.sppkg* file is there.

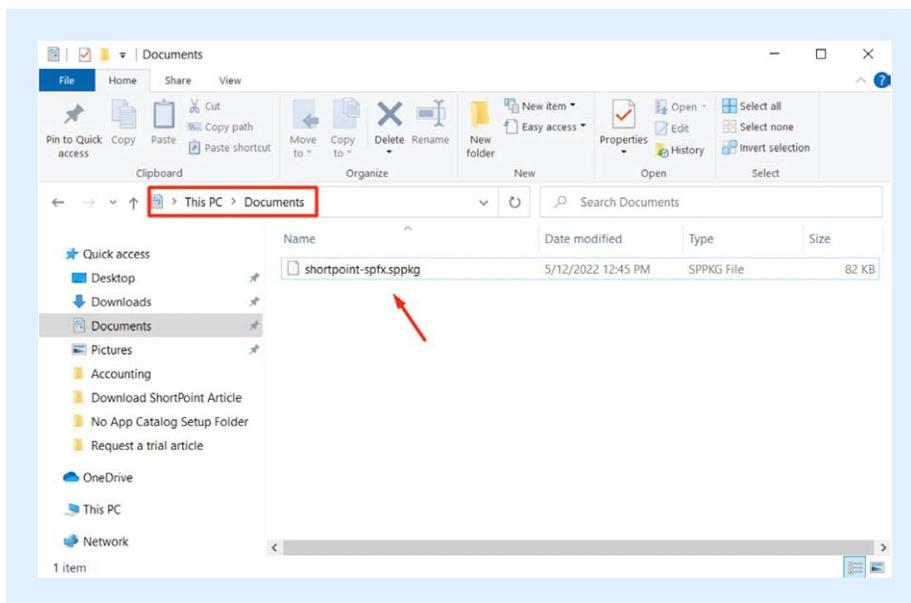


Figure 2.2.4 Checking the extracted shortpoint-spx.sppkg file

Section 3

Installing ShortPoint SPFx

This section walks you through the steps of installing ShortPoint. There are three major steps: uploading ShortPoint SPFx to the tenant app catalog, adding ShortPoint SPFx to SharePoint sites, and running ShortPoint installation from Dashboard.

3.1 Upload ShortPoint SPFx File to the Tenant App Catalog

Click the **App Launcher Icon** on the top left of your SharePoint Intranet site.

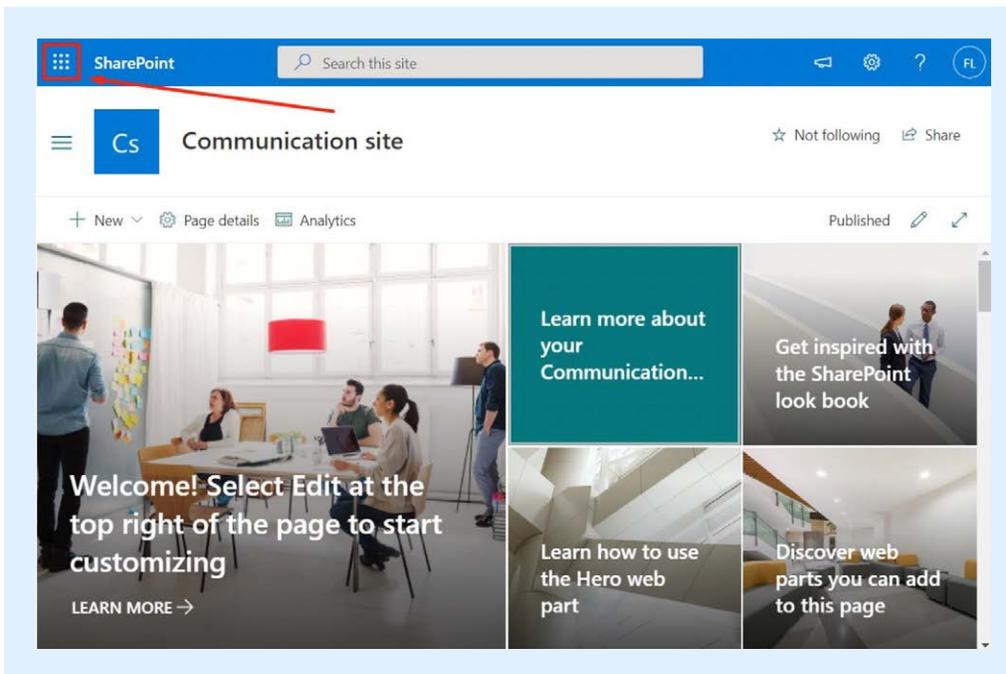


Figure 3.1.1 App Launcher Icon

Select **Admin**.

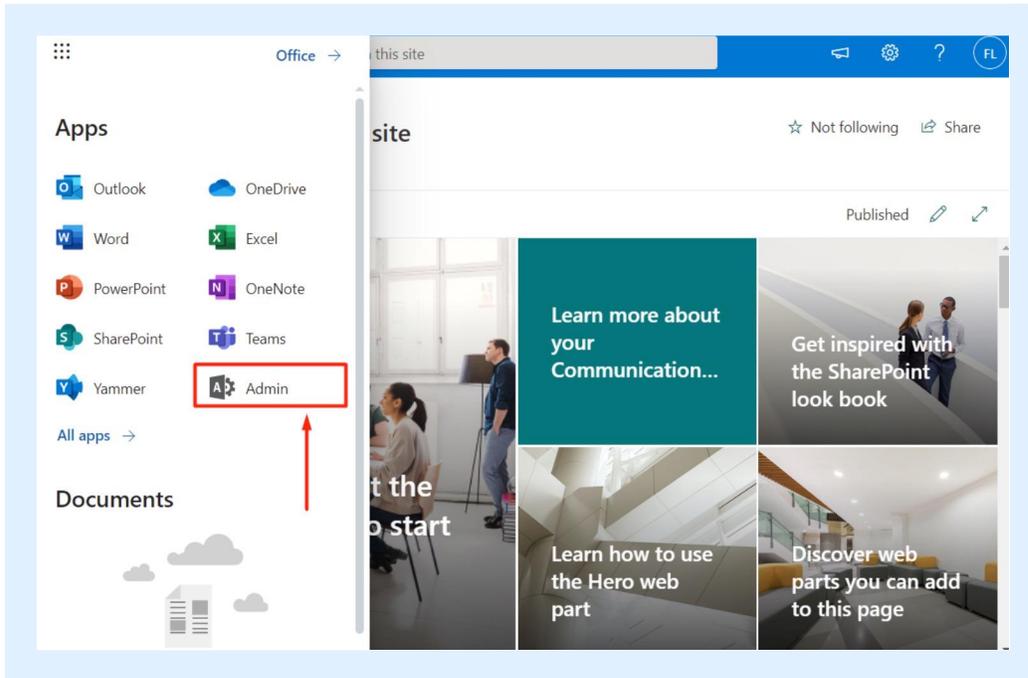


Figure 3.1.2 Admin button

This will take you to the Microsoft 365 admin center. Click **...Show all**.

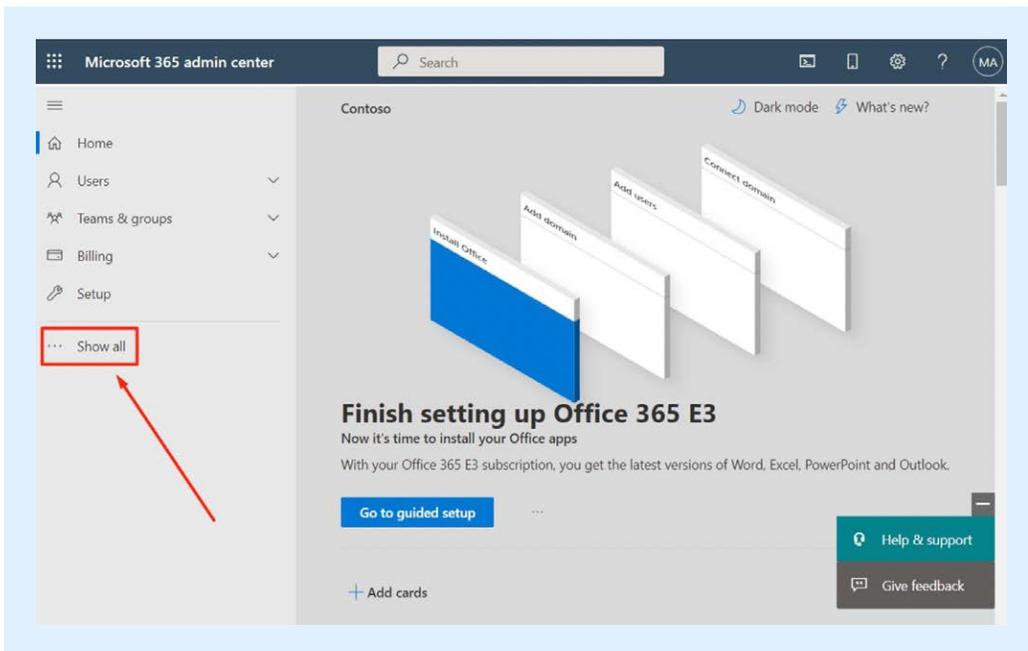


Figure 3.1.3 ...Show All button

Look for **SharePoint** from the side panel and click it.

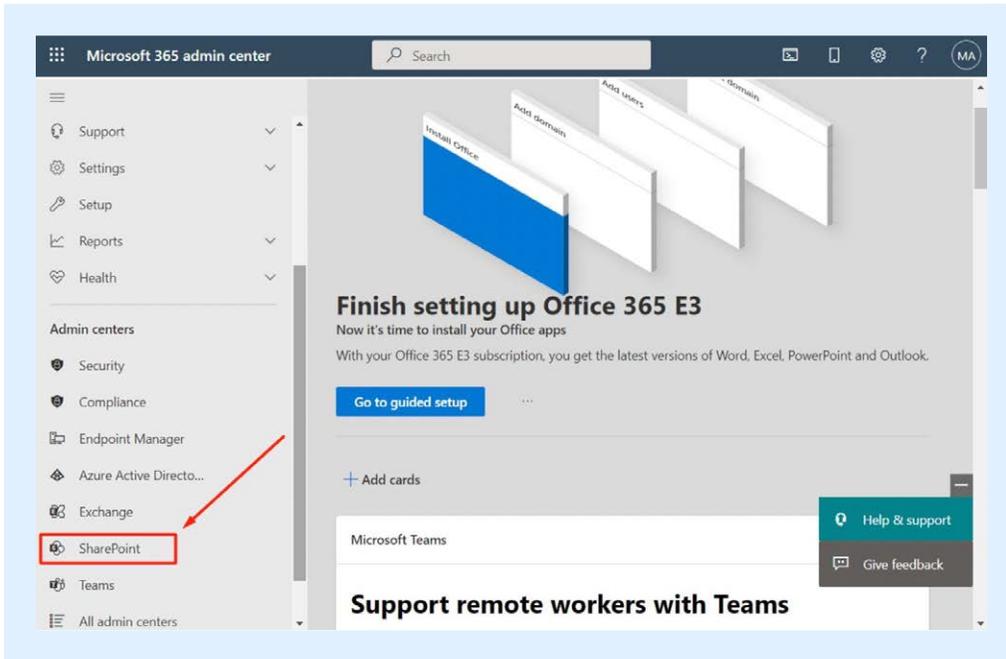


Figure 3.1.4 SharePoint button

This will take you to the SharePoint Admin Center. Select **More Features** from the side panel.

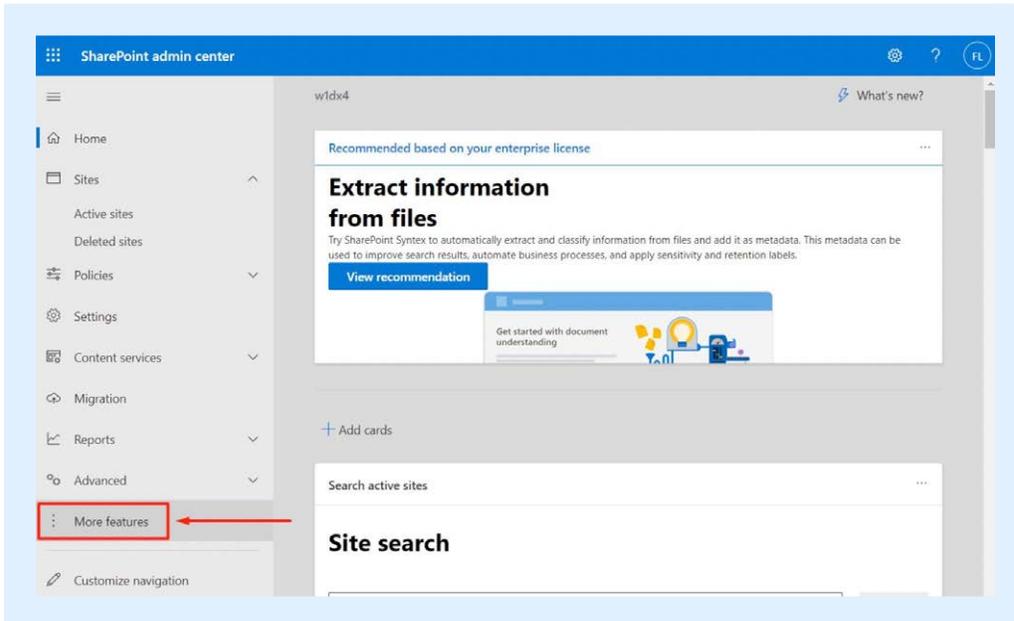


Figure 3.1.5 More Features button

Find the Apps section and click **Open**.

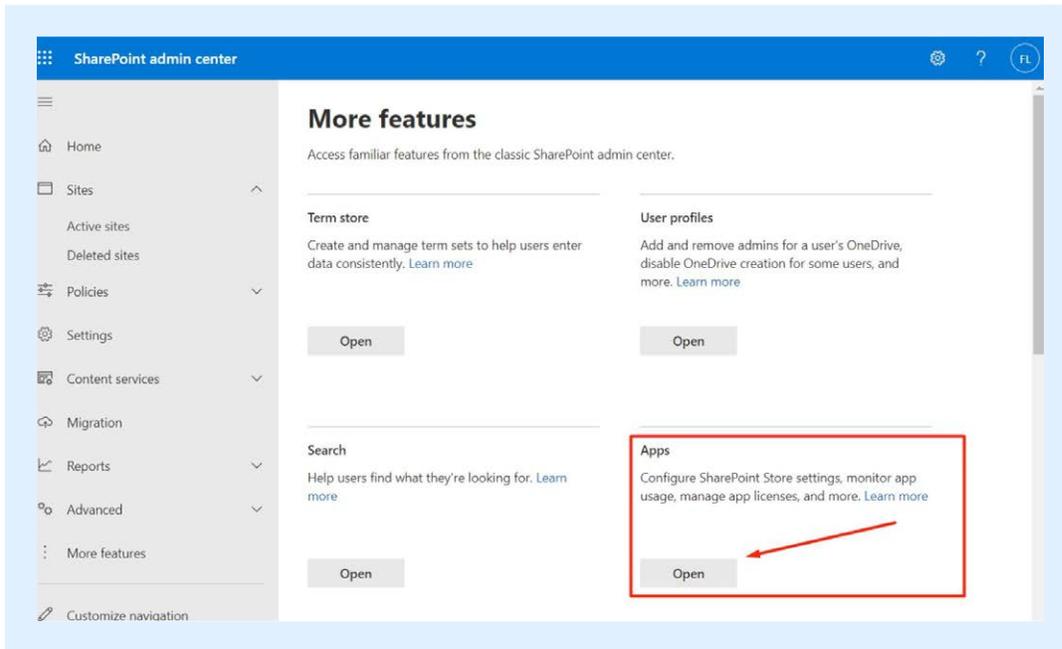


Figure 3.1.6 Apps section

If you have created an App Catalog before, you will see this.

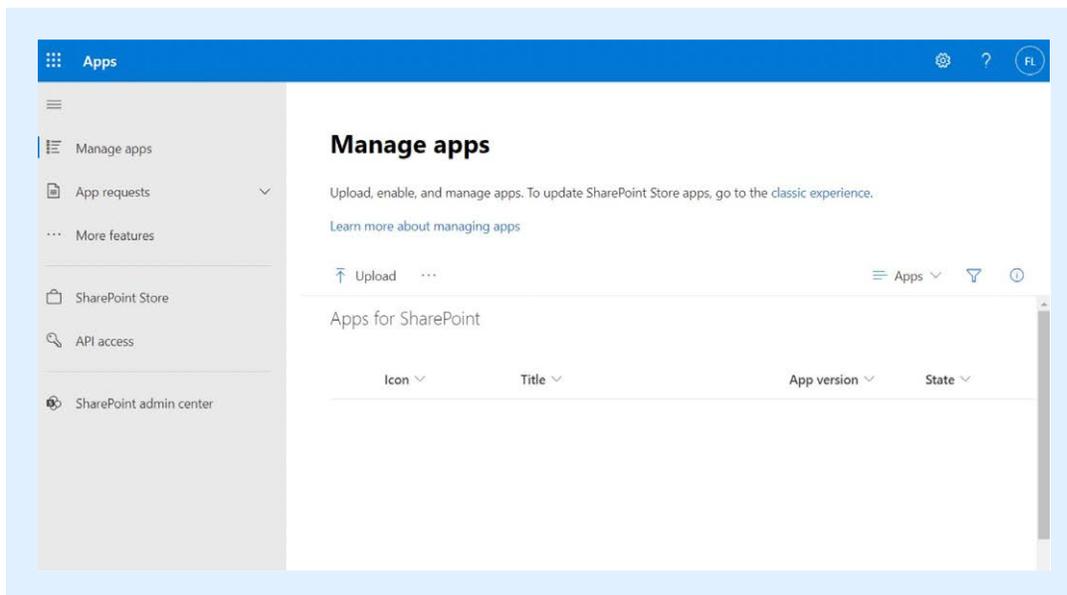


Figure 3.1.7 App Catalog

Otherwise, SharePoint will take a few minutes to create a new App Catalog for you.

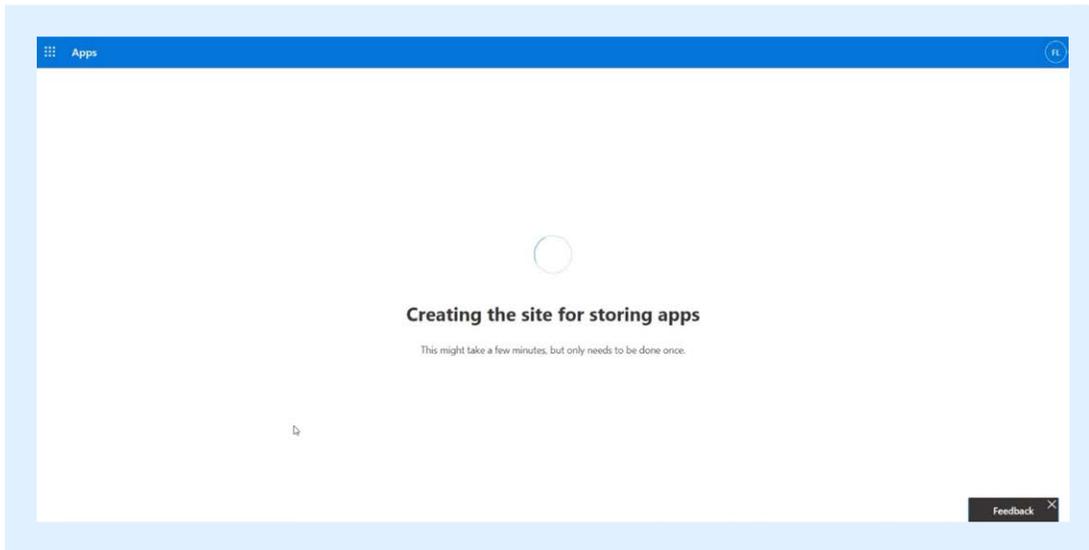


Figure 3.1.8 App Catalog creation

After it is done, you will see a pop-up message welcoming you to the new apps experience.

Click **Got it**.

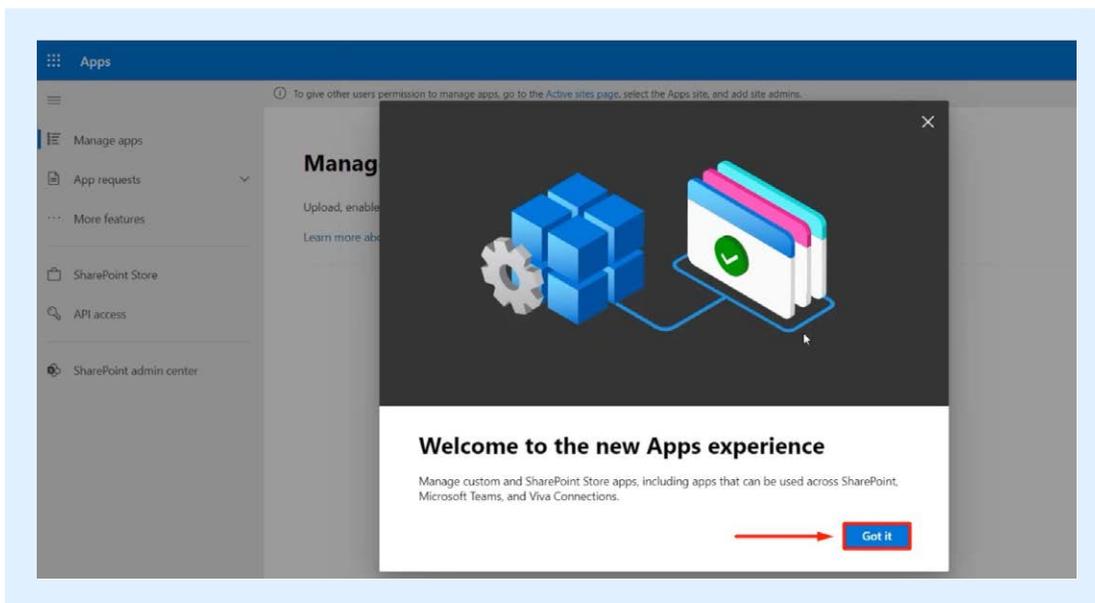


Figure 3.1.9 Welcome message for App Catalog

You will arrive at your App Catalog site. Click **Upload**.

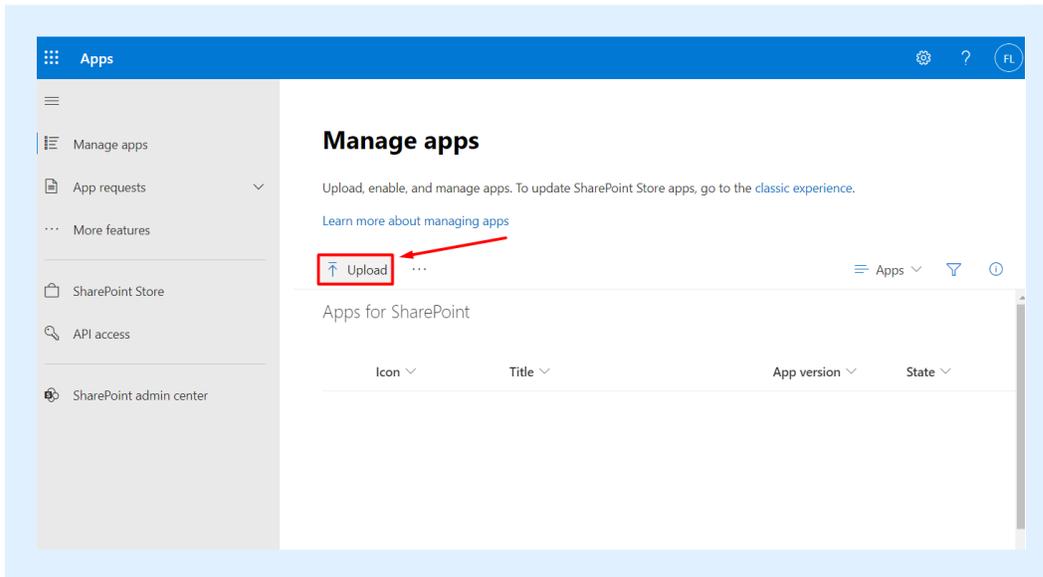


Figure 3.1.10 Upload button in App Catalog

Find the `shortpoint-spf.sppkg` file you extracted earlier and click **Open**.

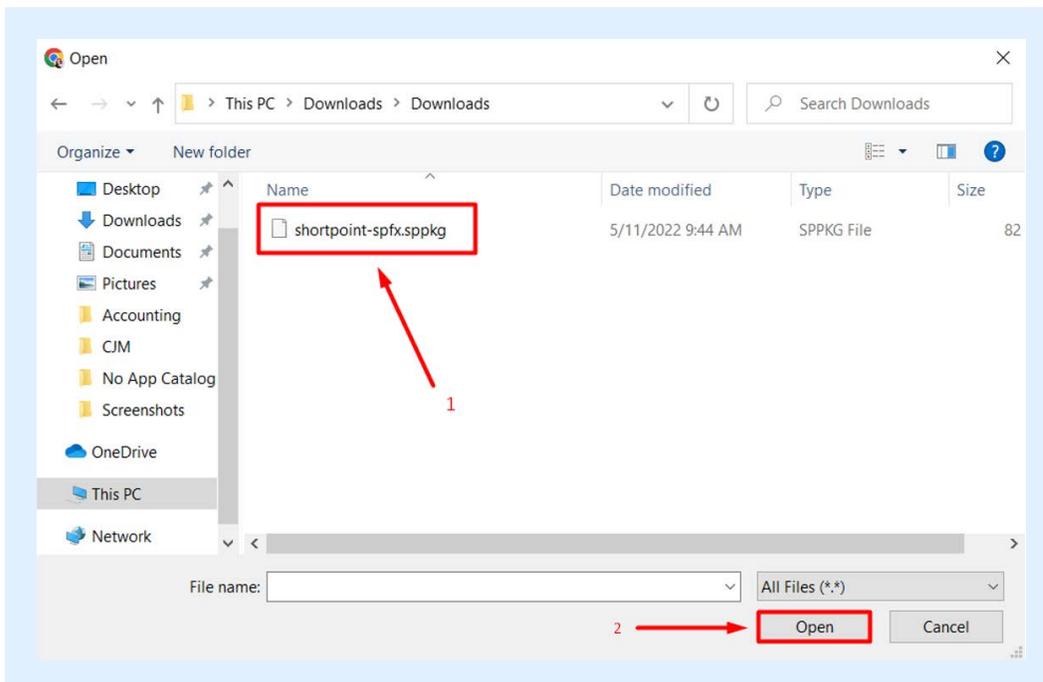


Figure 3.1.11 Uploading `shortpoint-spf.sppkg` file

On the next screen, click **Enable app**.

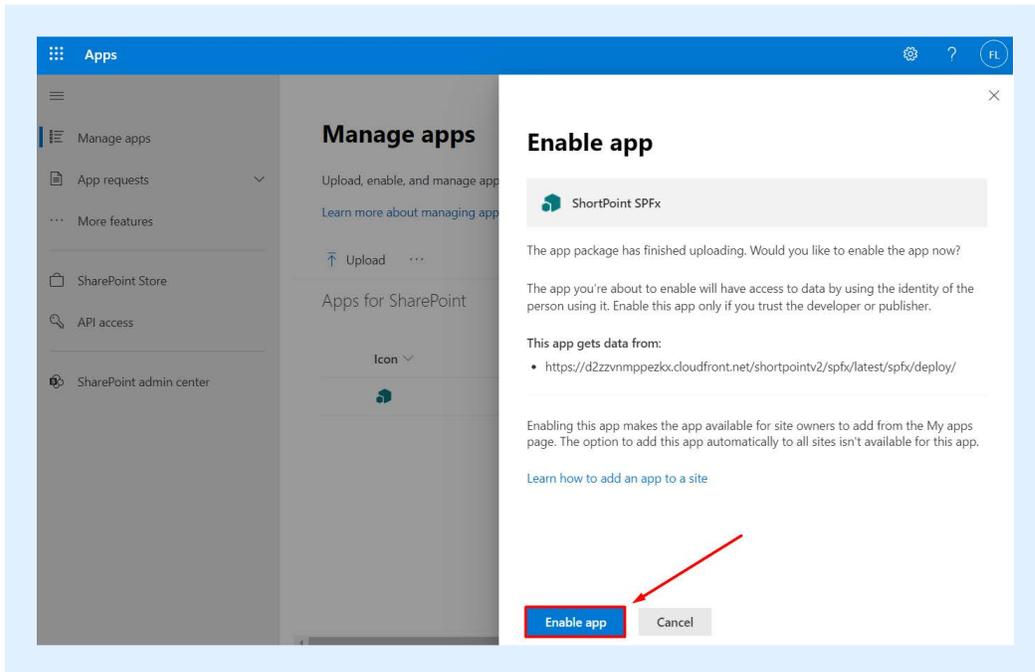


Figure 3.1.12 Enable app button

You will see a notification that the app has been enabled. Click **Close**.

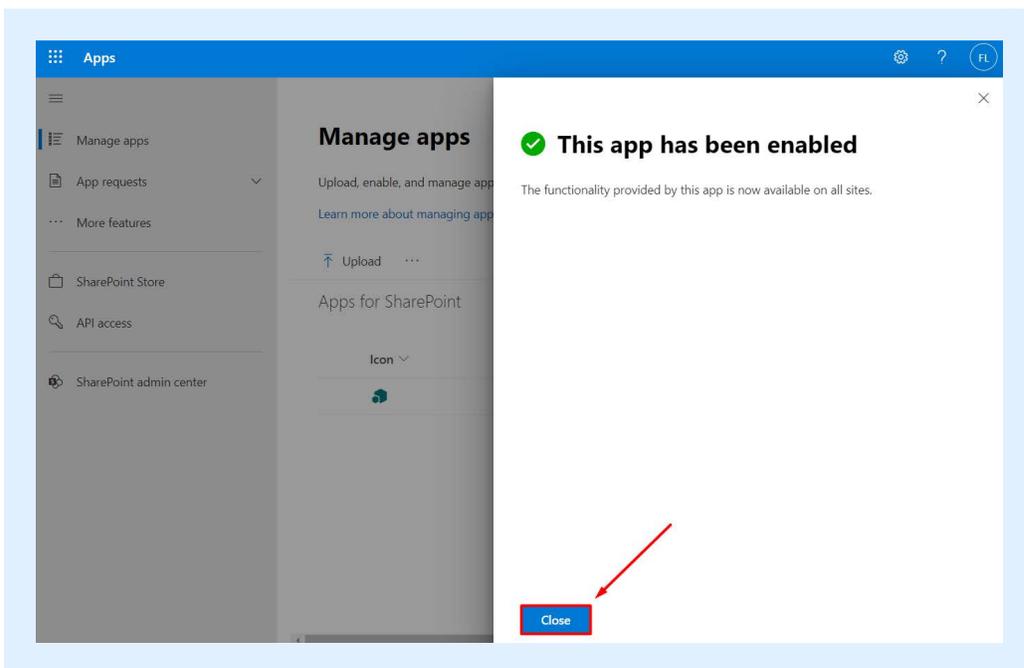


Figure 3.1.13 Close button

You will now see ShortPoint SPFx on your App catalog.

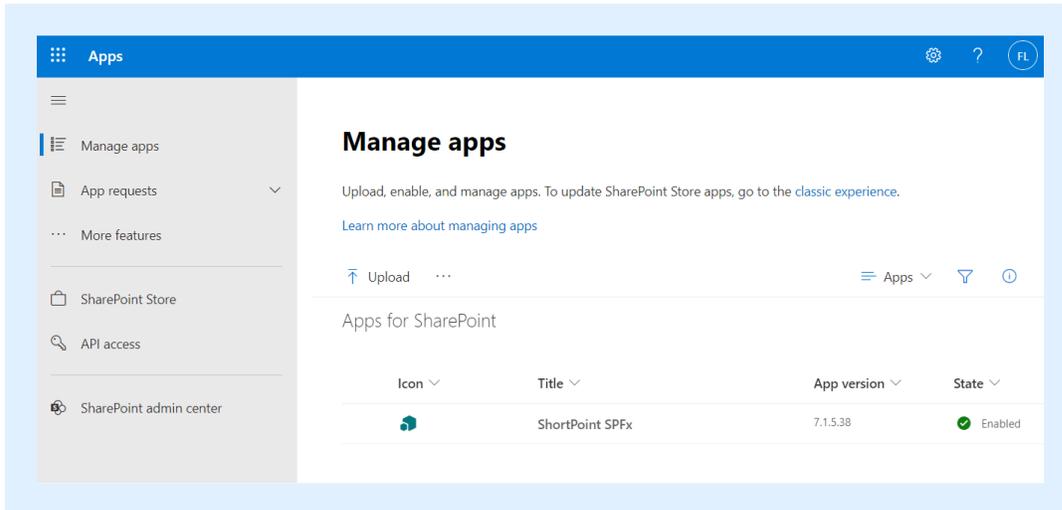


Figure 3.1.14 ShortPoint SPFx app in the App Catalog

3.2 Add ShortPoint SPFx to Site Contents

Open the site you want to install ShortPoint SPFx on. Click the **cog wheel** in the Suite Bar and choose **Site Contents** from the drop-down.

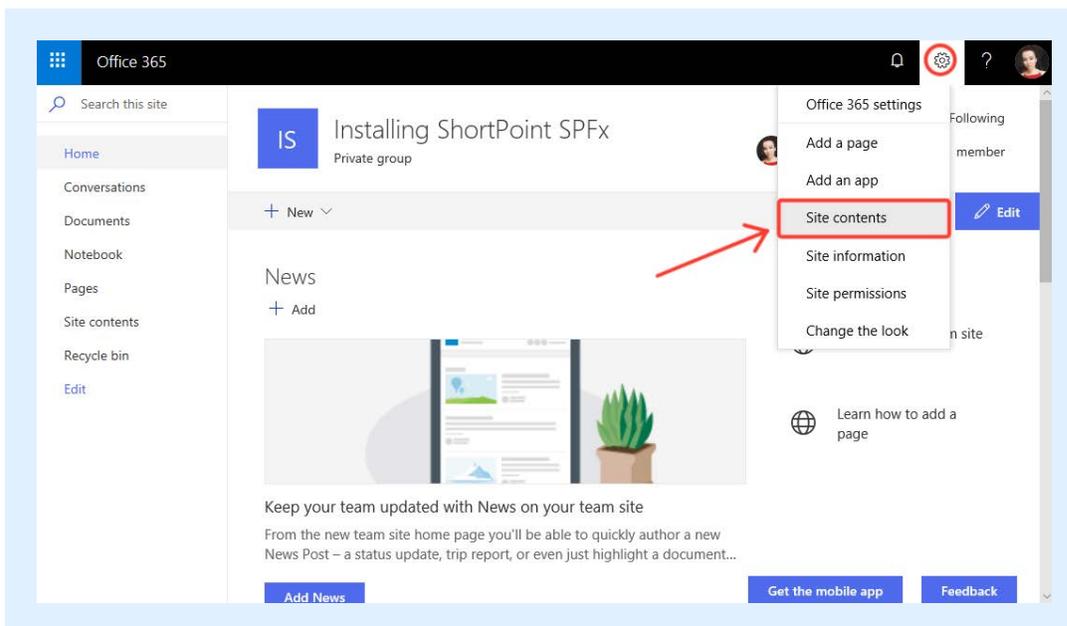


Figure 3.2.1 Site contents button

Depending on the SharePoint experience you have (Modern or Classic), you will be shown different interfaces.

3.2.1 Modern Experience

Click **(1) New**, and from the drop-down, choose **(2) App**.

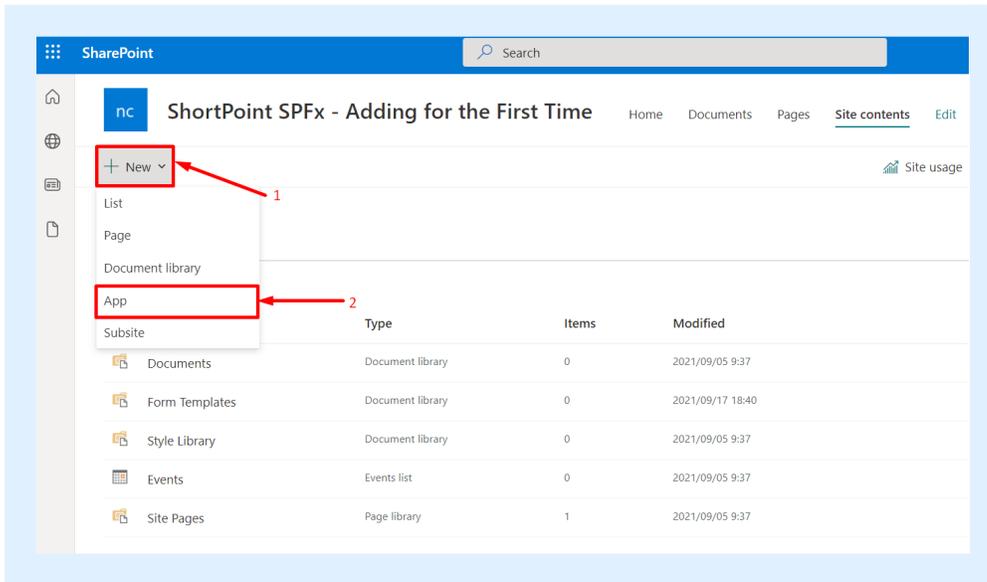


Figure 3.2.1.1 Adding an App to Site Contents (Modern Experience)

Under My Apps, you will be able to see all the apps you can add. Locate ShortPoint SPFx and click **Add**.

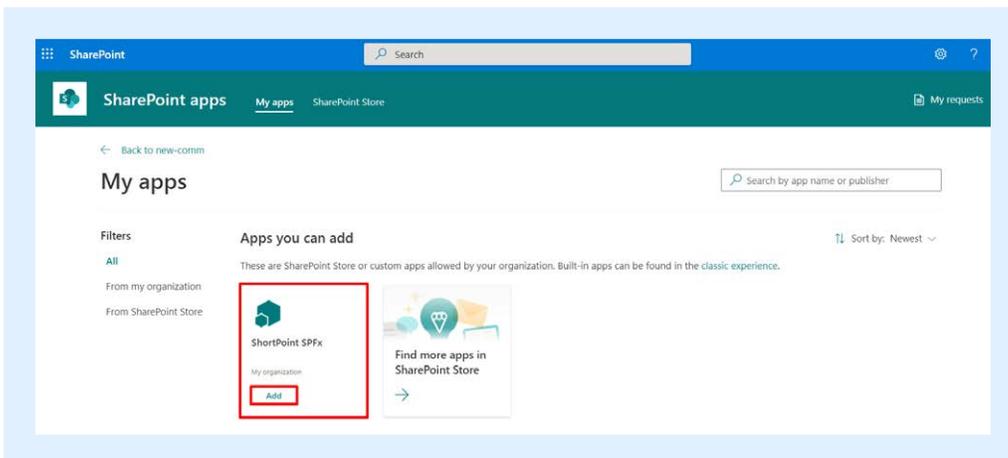


Figure 3.2.1.2 Add button (Modern experience)



A green pop-up message will appear saying that the app was Added successfully. Click the **Site contents page**.

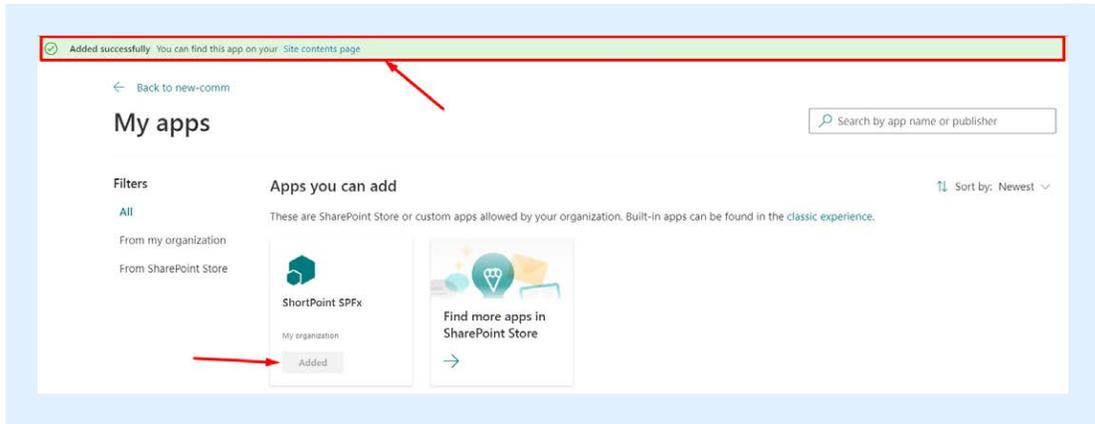


Figure 3.2.1.3 Site contents page button (Modern experience)

You will now see **ShortPoint SPFx** and **ShortPoint SPFx - Install Now!** on your Site contents. Take note that it can take some time for ShortPoint SPFx and ShortPoint SPFx - Install Now! to become available. Wait for at least 10 minutes or refresh the page if the icons are dimmed (disabled) after they are added.

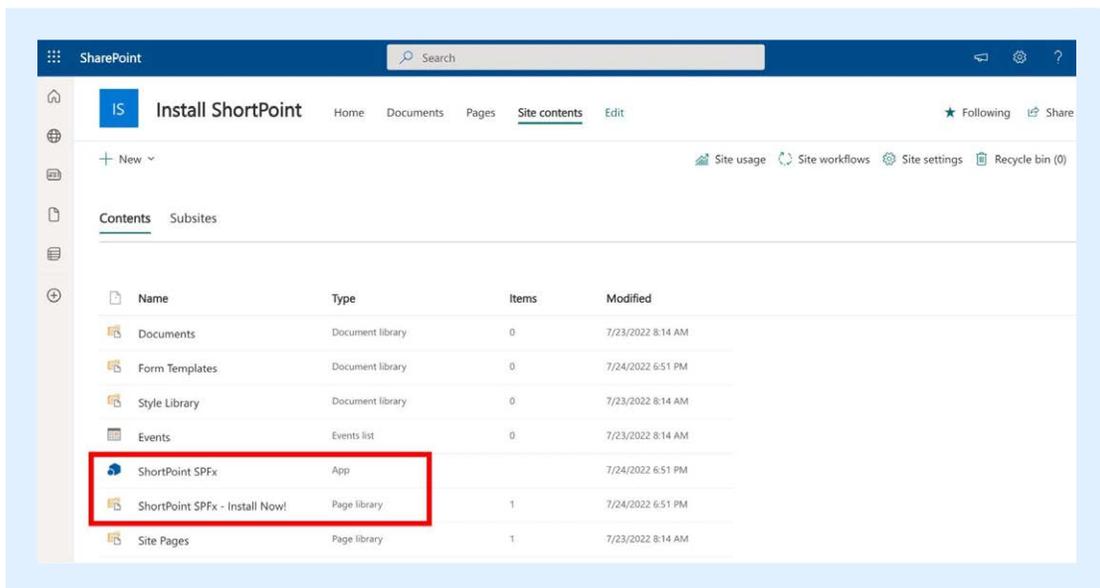


Figure 3.2.1.4 ShortPoint SPFx app and ShortPoint SPFx - Install Now! (Modern experience)

3.2.2 Classic Experience

Click **Add an app**.

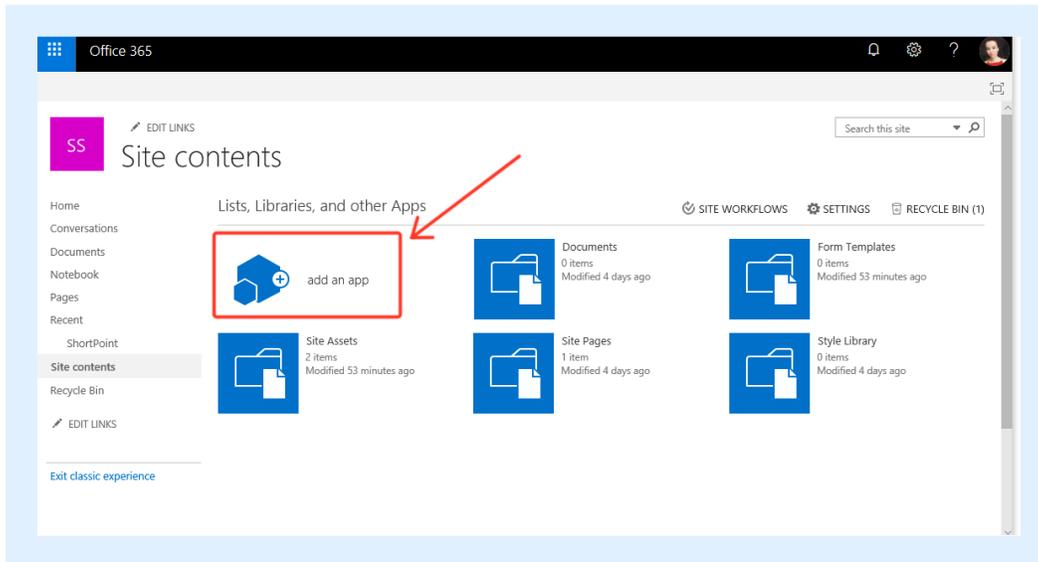


Figure 3.2.2.1 Add an app button (Classic experience)

Under Apps you can add, click **ShortPoint SPFx**.

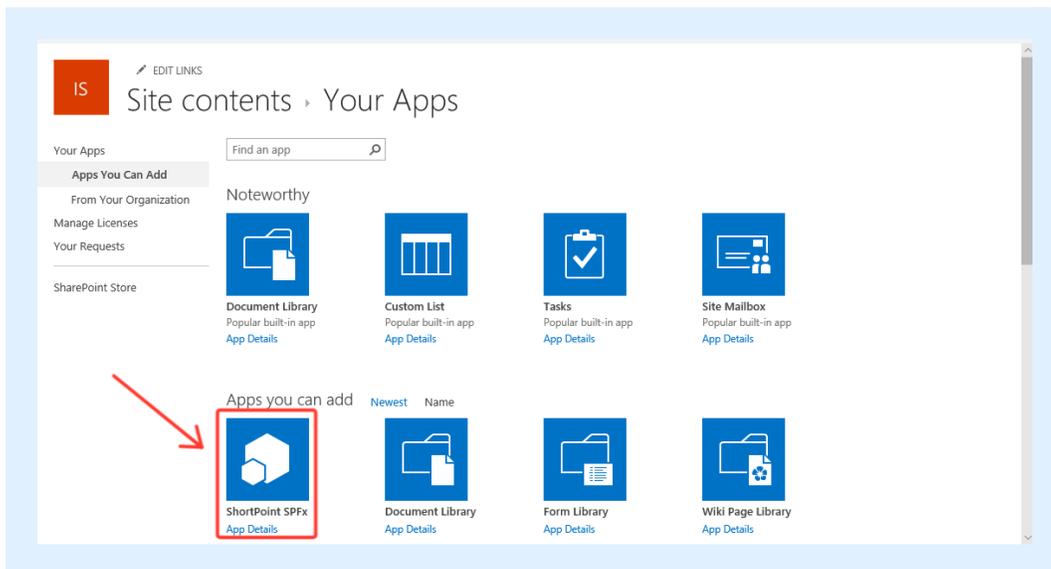


Figure 3.2.2.2 ShortPoint SPFx button (Classic experience)

After clicking, you will be redirected to your Site Contents page. You will now see **ShortPoint SPFx** and **ShortPoint SPFx - Install Now!** on your Site contents. Take note that it can take some time for ShortPoint SPFx and ShortPoint SPFx - Install Now! to become available. Wait for at least 10 minutes or refresh the page if the icons are dimmed (disabled) after they are added.

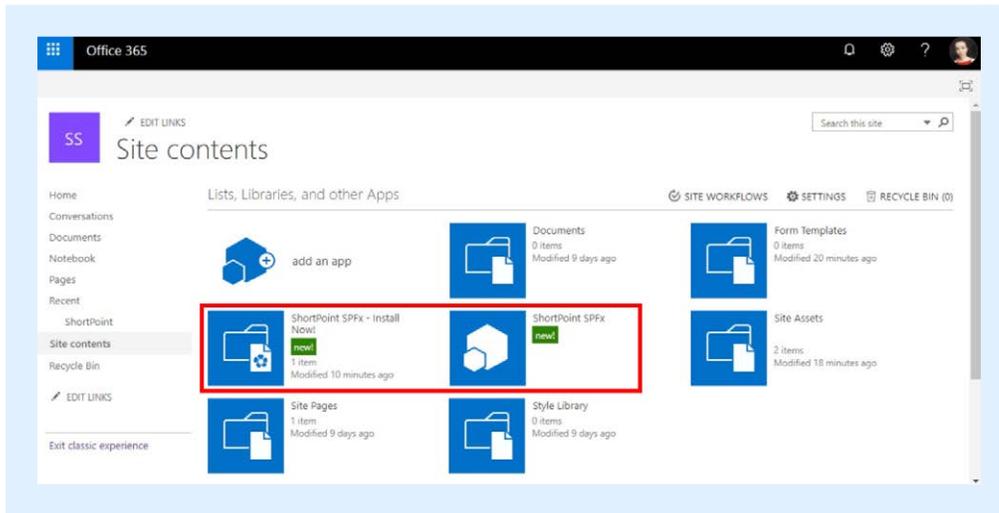


Figure 3.2.2.3 ShortPoint SPFx and ShortPoint SPFx - Install Now! (Classic experience)

3.3 Run ShortPoint SPFx Installation from Dashboard

From the site contents page, click **ShortPoint SPFx - Install Now!** This will redirect you to the ShortPoint Dashboard.

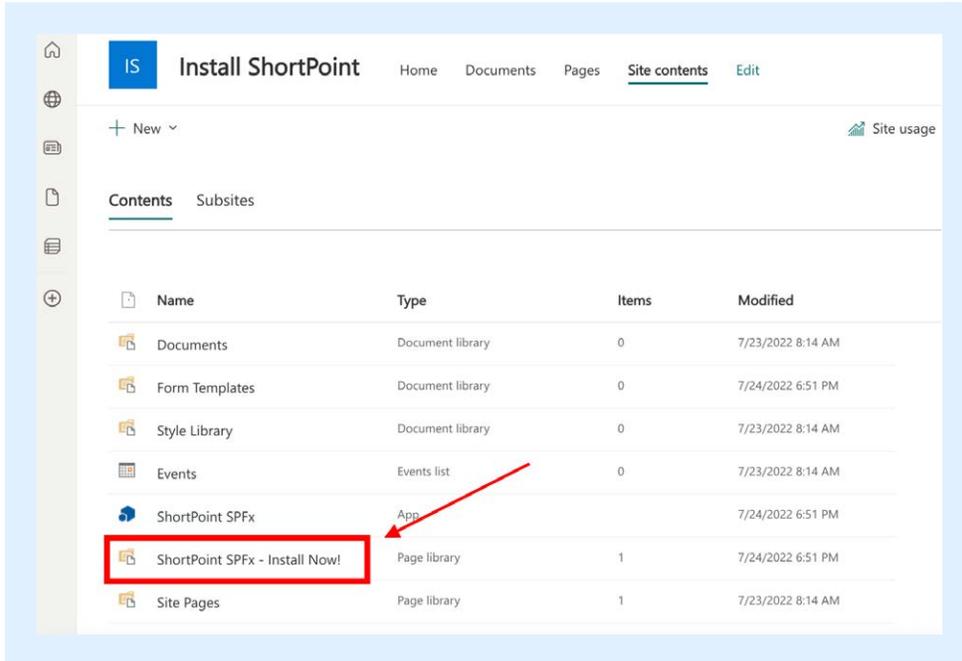


Figure 3.3.1 ShortPoint SPFx - Install Now! (Modern experience)

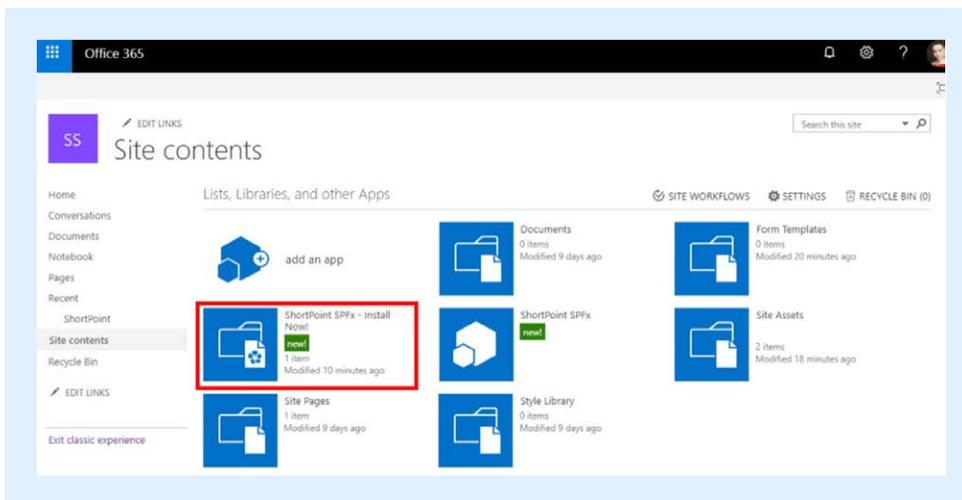


Figure 3.3.2 ShortPoint SPFx - Install Now! (Classic experience)

On the ShortPoint Dashboard, click **Installation**.

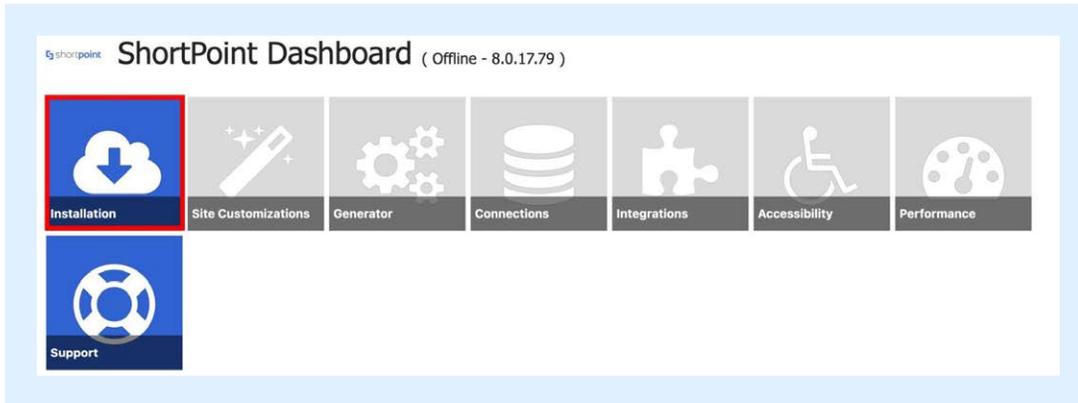


Figure 3.3.3 Installation button in the ShortPoint Dashboard

By default, *Install for Classic Pages* is disabled. But if you wish to install ShortPoint for both Classic and Modern SharePoint pages, you may enable this option. You can also enable *Site Collection Scope installation* if you wish to install ShortPoint on all sites and subsites within the site collection. After selecting your preference, click **Install**.

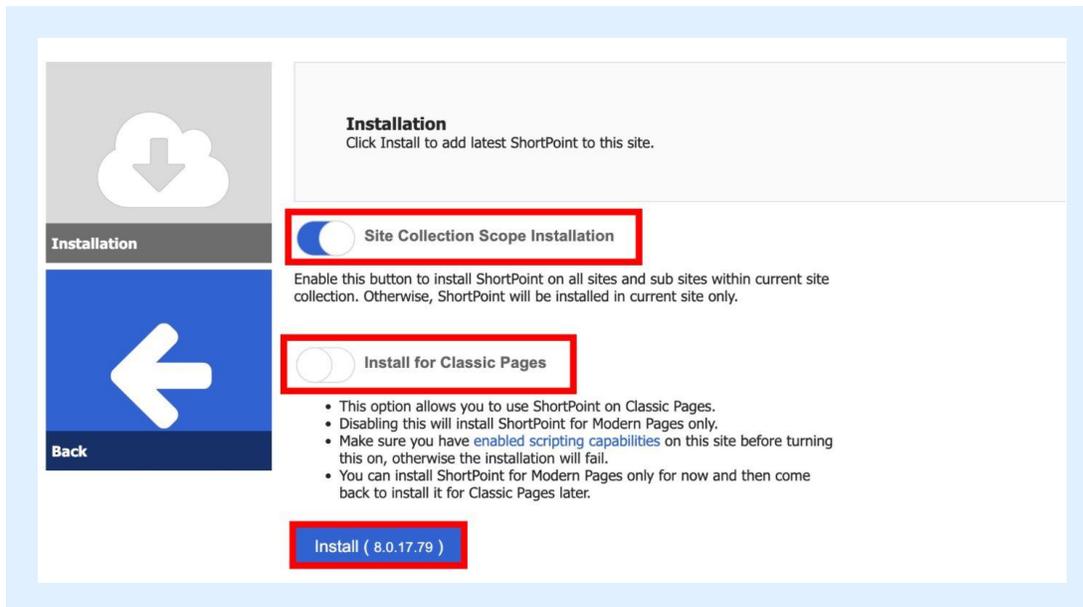


Figure 3.3.4 Site Collection Scope Installation and Classic Page Installation

NOTE: If you want to enable ShortPoint for classic pages or you have encountered an error saying that scripting capabilities are not enabled, check out [Enabling Scripting Capabilities \(SPFx\) in Office 365 \(Classic Sites\)](#).

Once installation is complete, a green pop-up will appear indicating that the installation was completed successfully.

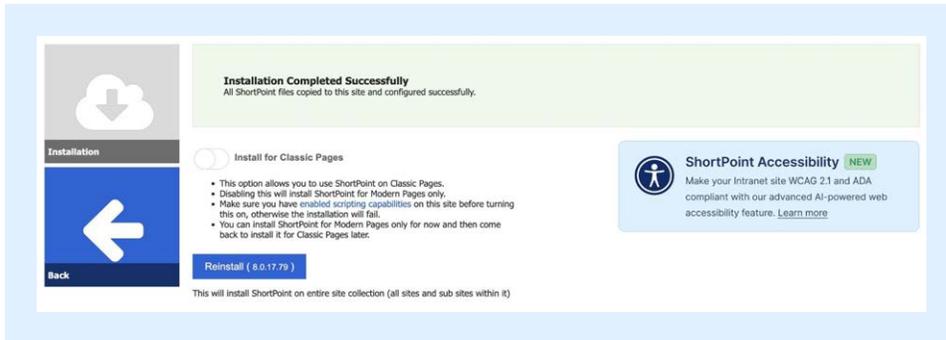


Figure 3.3.5 Installation completed successfully message

Congratulations, you have now installed ShortPoint! You will now see **ShortPoint Dashboard** and **ShortPoint SPFx** on your Site Contents page.

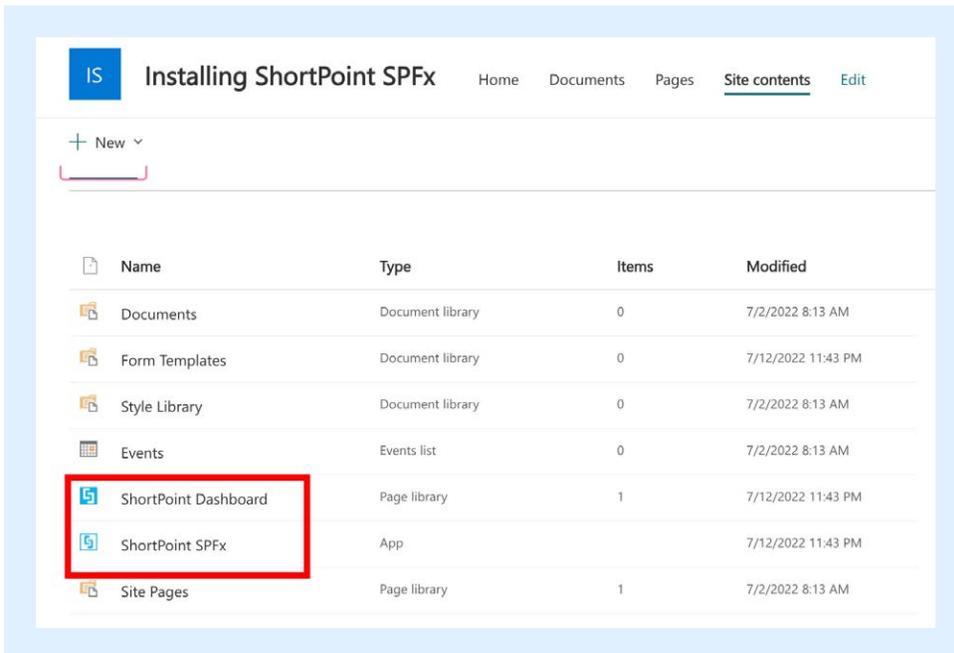


Figure 3.3.6 ShortPoint Dashboard and ShortPoint SPFx in the Site Contents page

Section 4

Post-installation

This section discusses license activation, a process you need to do to activate your trial license, or if you have purchased a license from ShortPoint.

License Activation

To activate the ShortPoint SPFx license, you need to go to **Site Contents**, locate **ShortPoint Dashboard**, and click **Licensing**.

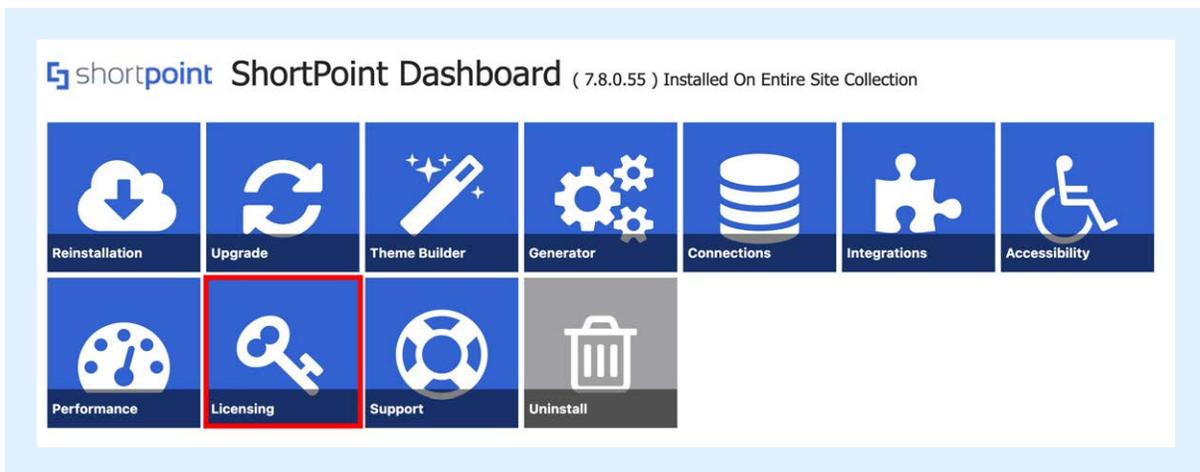


Figure 4.1.1 Licensing button in the ShortPoint Dashboard

If you signed up for the trial license or have purchased a license, you will see that a new license is available. Click **Activate**.

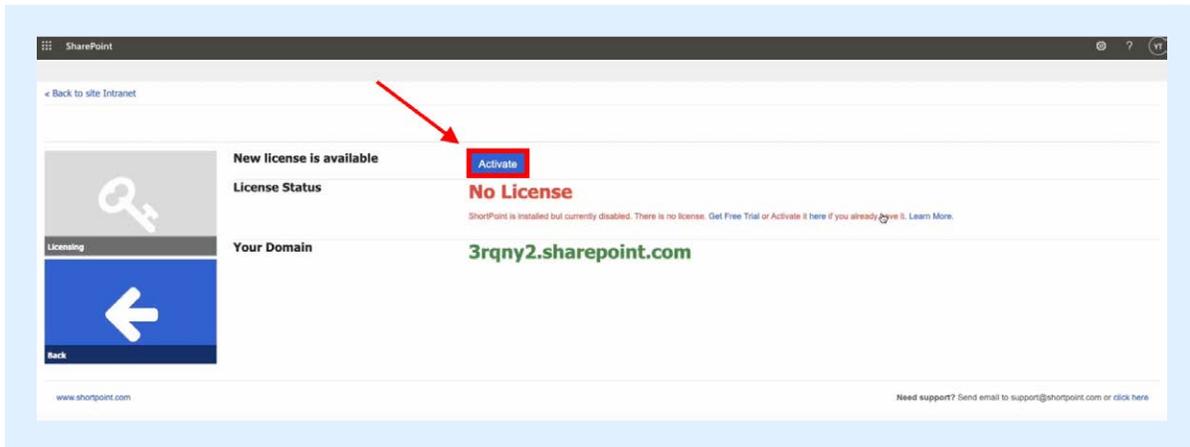


Figure 4.1.2 Activate button

If you are on a trial license, you will see that your License Status is Active - Trial. It will show you how many days are left for your trial and you will also have the option to buy a license.

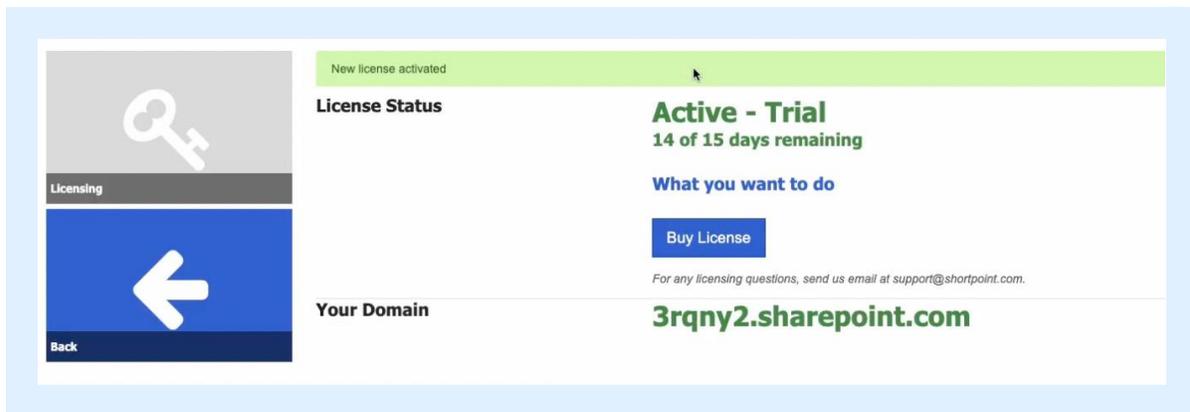


Figure 4.1.3 Active - Trial License Status

Alternatively, if you have purchased a license, you will see that you are on Active - OnDemand License. The number of days left before renewal will also appear.

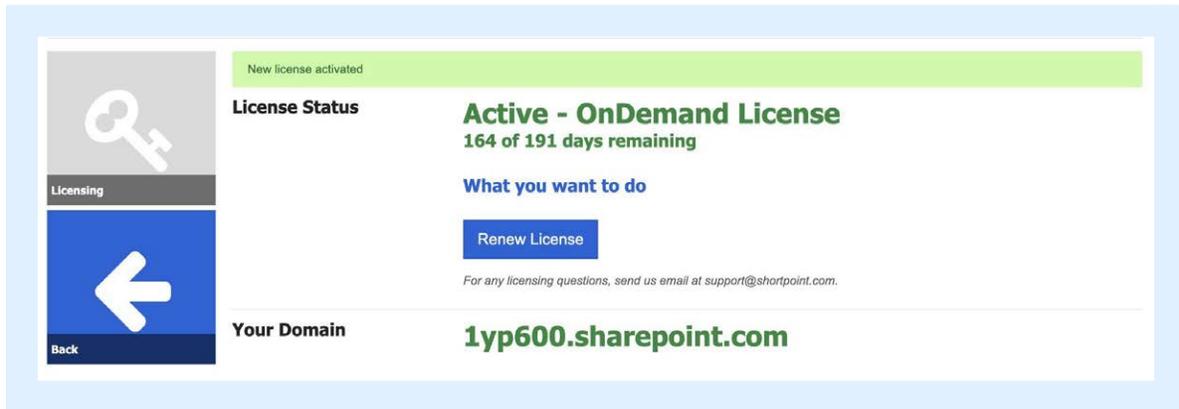


Figure 4.1.4 Active - OnDemand License Status

If it is your first time purchasing an OnDemand license, you will also need to assign ShortPoint Users to accounts from your environment. Simply type the name of the user on the search box and click **Save Changes**.

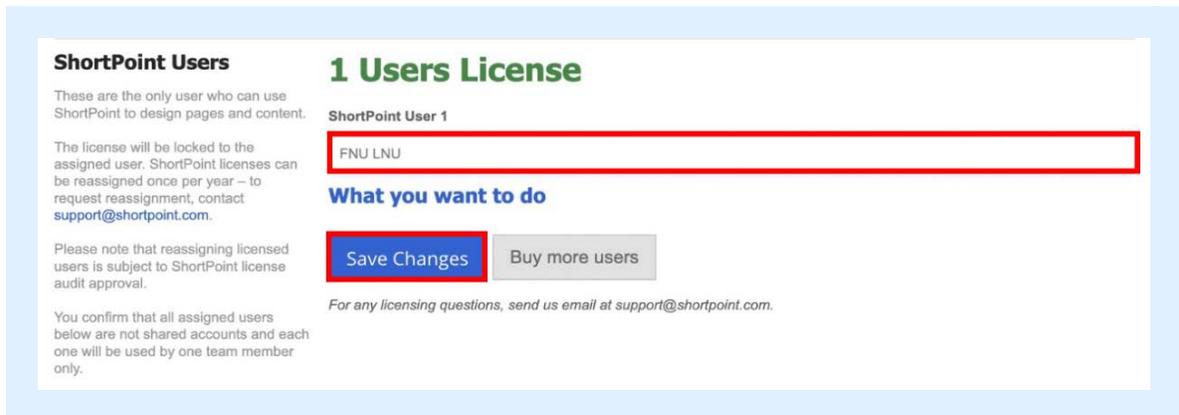


Figure 4.1.5 Assigning ShortPoint Users

NOTE: By default, ShortPoint will assign the user who installed ShortPoint SPFx as a ShortPoint user. After, you may only change the default user and assign it to someone else once a year. For further assistance, you may reach out to support@shortpoint.com.

That's it! You now have ShortPoint installed.

Final Remarks.

You have now reached the end of this guide. Thank you for installing ShortPoint SPFx for Office 365 (SharePoint Online).



If you need further assistance, you may reach out to us through the following methods:

-  Email - support@shortpoint.com |
-  Knowledge Base - support.shortpoint.com |
-  Website- shortpoint.com

Elegant Intranet sites
anyone can design.