

Admin Guide.

Installation
And Activation



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

ENVIRONMENT

This guide is for Microsoft 365
(SharePoint Online) users

SHORTPOINT SPFX VERSION

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

Version 1.5

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Section 1

Installation Methods

This section discusses the two installation methods you can use to add ShortPoint SPFx to your SharePoint sites.

There are two ways to install ShortPoint SPFx on your SharePoint site. You can use **ShortPoint automated installation (recommended)** or **install ShortPoint SPFx manually**. Follow the installation method that best suit your needs.

1.1 ShortPoint Automated Installation (Recommended)

This is the automated installation experience of ShortPoint. You can easily access it by going to shortpoint.com and clicking the **Download** or **Start Trial** button.

Proceed to [Section 3: ShortPoint Automated Installation](#) for a step-by-step guide on how to use it.

1.2 Manual Installation

This is the back-up installation method of ShortPoint SPFx. You can proceed to [Section 4: Manual Installation](#) for a step-by-step guide on how to manually install ShortPoint SPFx.

Section 2

Required Permissions

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

You must have the necessary permissions before installing ShortPoint. Depending on the installation method you will use, you will need the following permissions:

2.1 Global Microsoft 365 Admin (for ShortPoint Automated Installation)

If you will use ShortPoint Automated Installation to install ShortPoint SPFx, you need to be a Global Microsoft 365 Admin. 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 Microsoft 365 Global Admin. Otherwise, you will not be able to access the page. Contact your IT department to help you upload ShortPoint SPFx to the App Catalog.



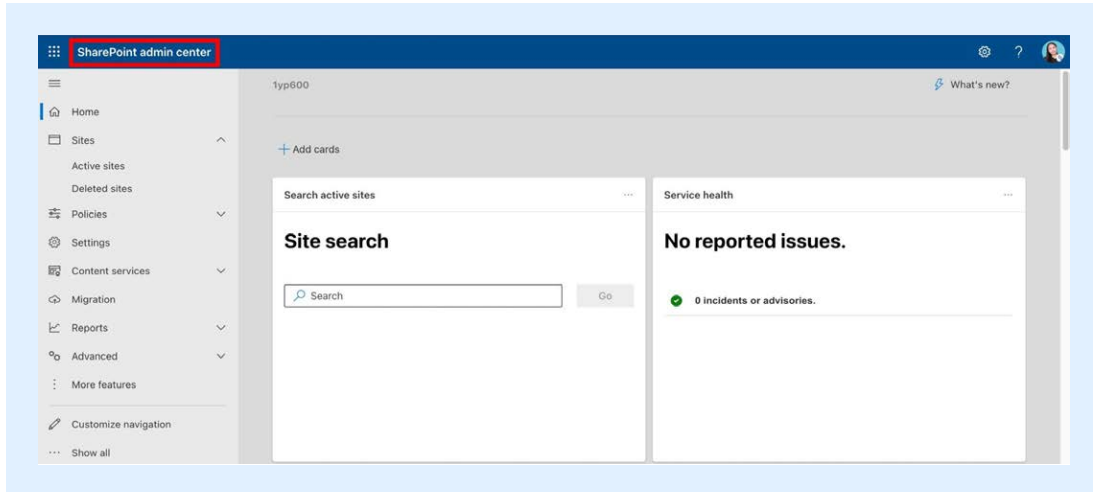


Figure 2.1.1 SharePoint Admin Center page

2.2 Site Collection Administrator (for Manual Installation)

If you will manually install ShortPoint SPFx, you need to be a Site Collection Administrator on the App Catalog Site Collection and you also need to be a Site Collection Administrator on the site collection that you're installing ShortPoint on. To check, go to your SharePoint Admin Center and select **Active Sites** from the side panel.

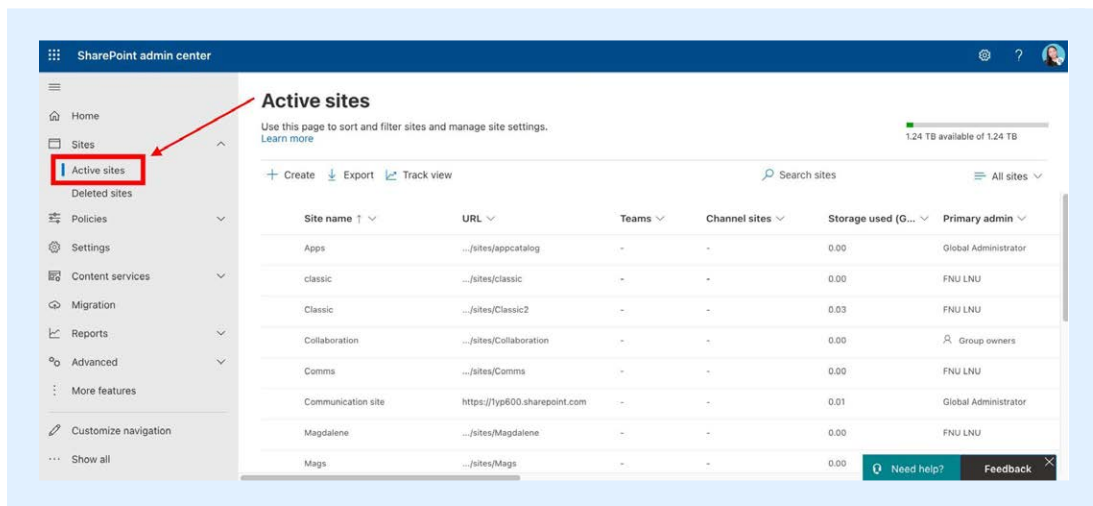


Figure 2.2.1 Active Sites page

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.

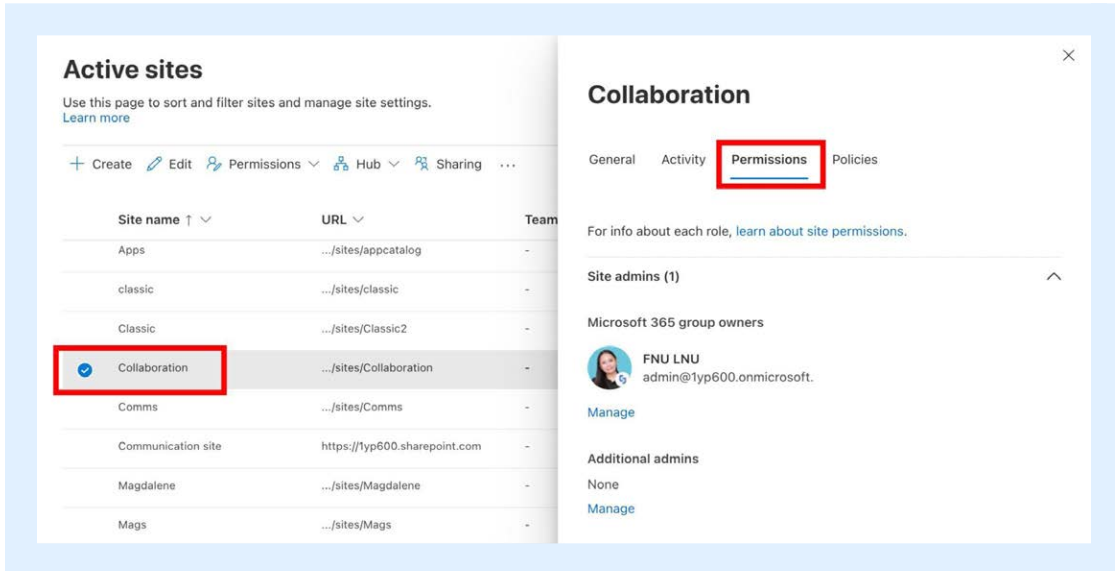


Figure 2.2.2 Permissions tab

Section 3

ShortPoint Automated Installation

This section discusses how to use ShortPoint Automated Installation to install ShortPoint SPFx on your SharePoint sites.

This is the **recommended installation method for ShortPoint SPFx**. Follow the steps to get started.

Go to shortpoint.com and click **Download**:

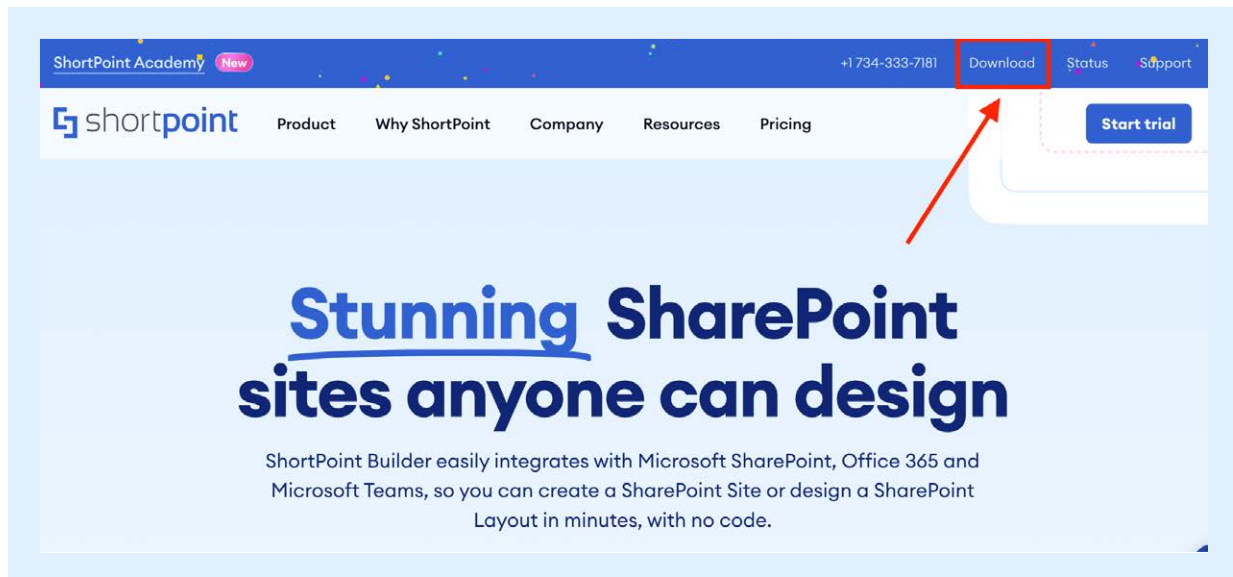


Figure 3.1 Download button

Then, select **Microsoft 365** from the list of products:



Figure 3.2 Office 365

Click **Install ShortPoint SPFx for Microsoft 365**:



Figure 3.3 Download button

Select whether you are a new or existing customer. For this guide, we will select **New Customer**:

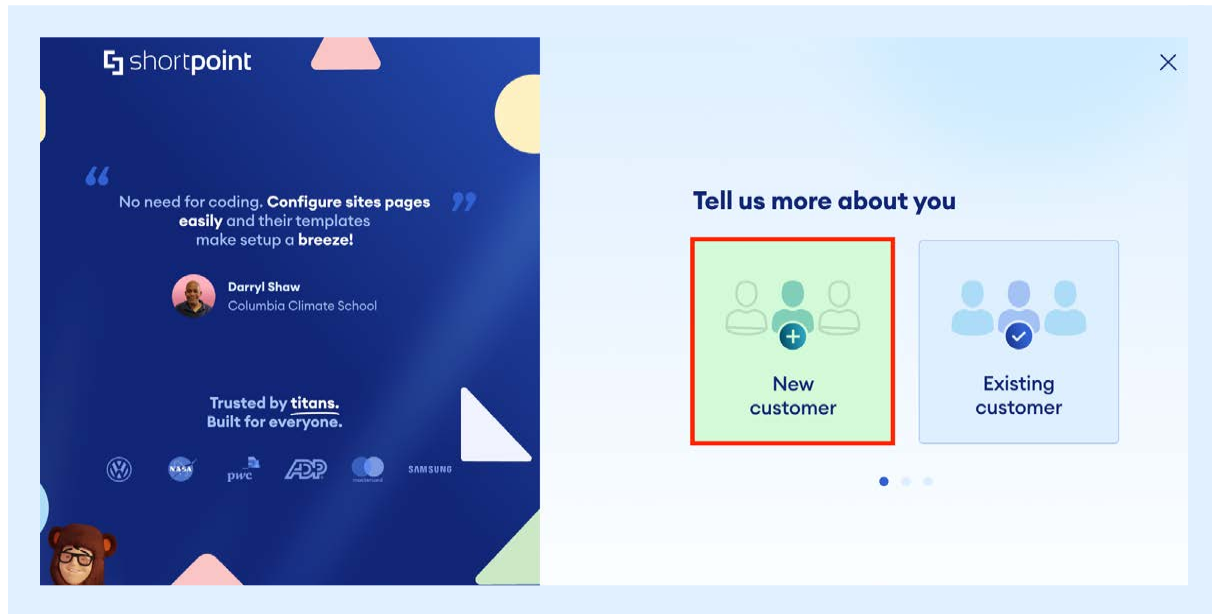


Figure 3.4 Customer Selection

Fill the necessary fields and click **Next**:

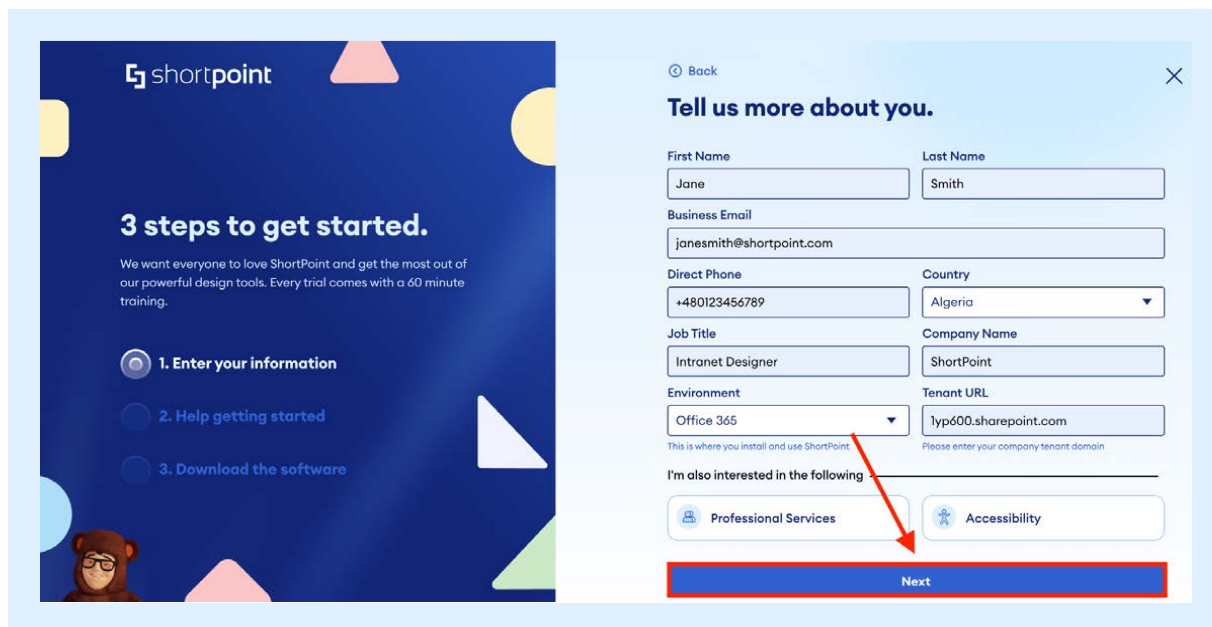


Figure 3.5 Fill the form

(Optional) If you want to schedule a complimentary training from a ShortPoint expert, select your preferred **training date**:

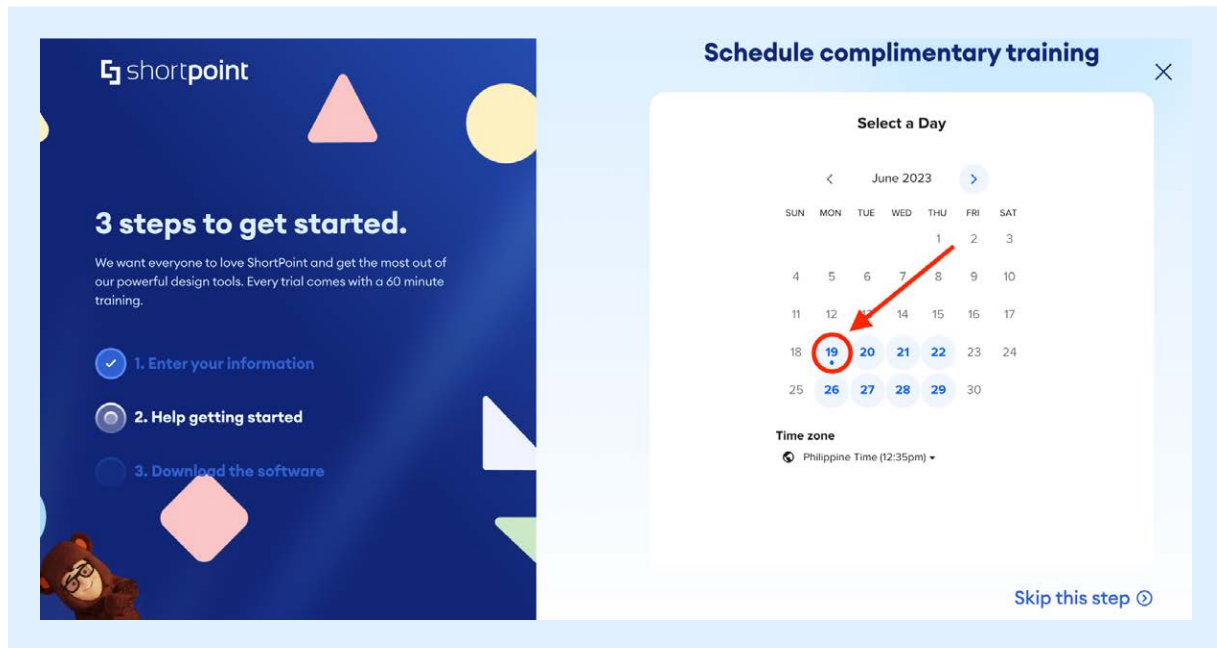


Figure 3.6 Select Training Date

(Optional) Then, select a training time and click **Next**:

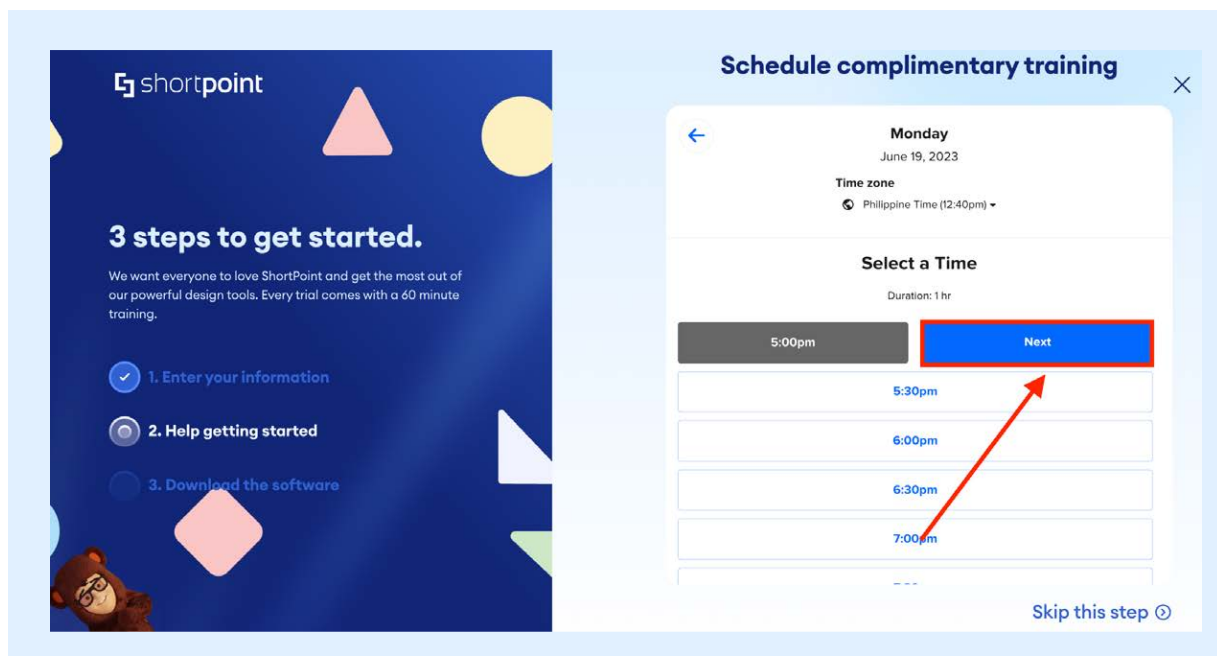


Figure 3.7 Select Training Time

(Optional) Once you have confirmed your training details, click **Schedule Event**:

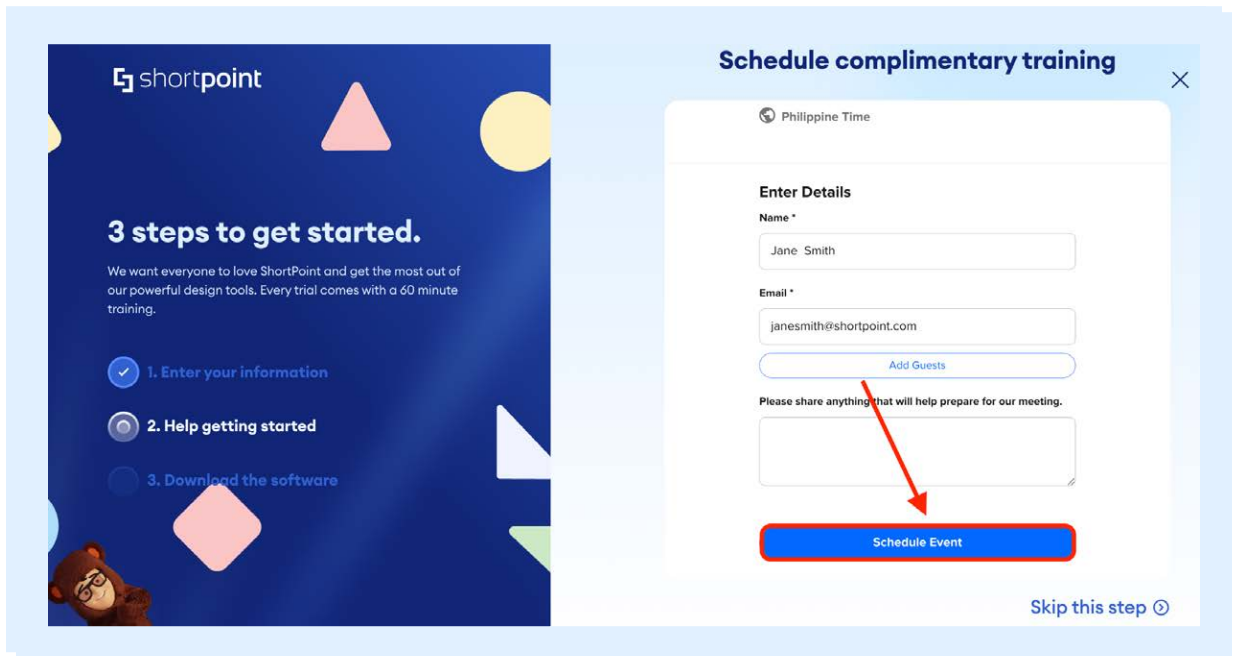


Figure 3.8 Schedule Event Button

Select **Start Installation**:

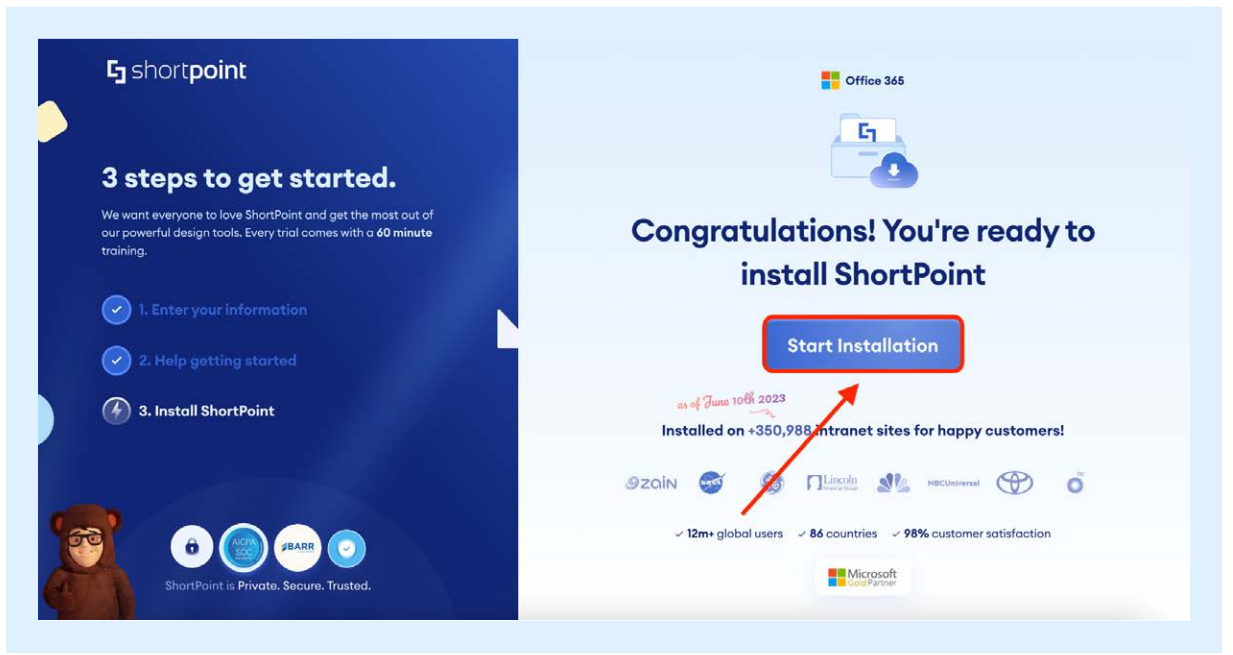


Figure 3.9 Schedule Event Button

You will be prompted to **login to your Microsoft 365 account**. This does not install ShortPoint to your tenant yet, but is needed to check if you have the necessary permissions to install apps on your tenant:

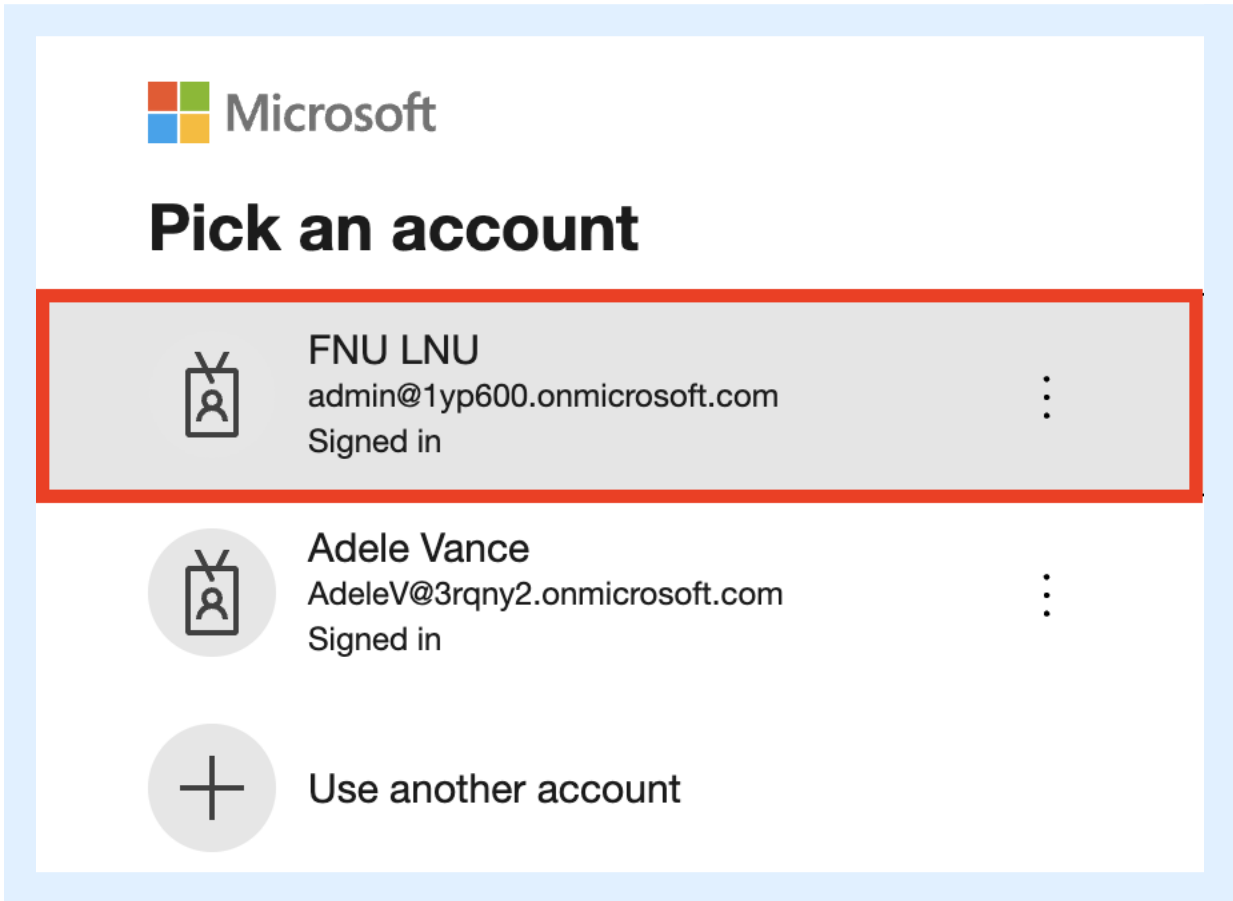


Figure 3.10 Microsoft 365 Login

NOTE: *If you don't have the necessary permissions to install ShortPoint on your environment, you will be redirected to a page where you can request help from your SharePoint admins. At the same time, you will be able to try ShortPoint and its features using an interactive experience.*

Then, click **Proceed**:

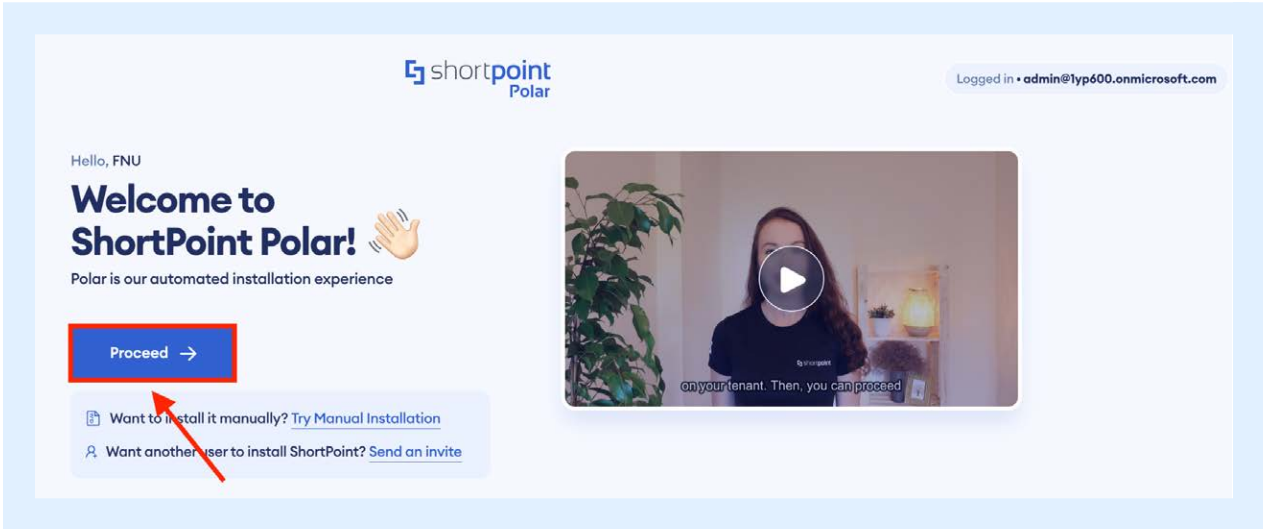


Figure 3.11 Proceed Button

[1] **Accept the Terms and Conditions** and click [2] **Add ShortPoint to a New Site**:

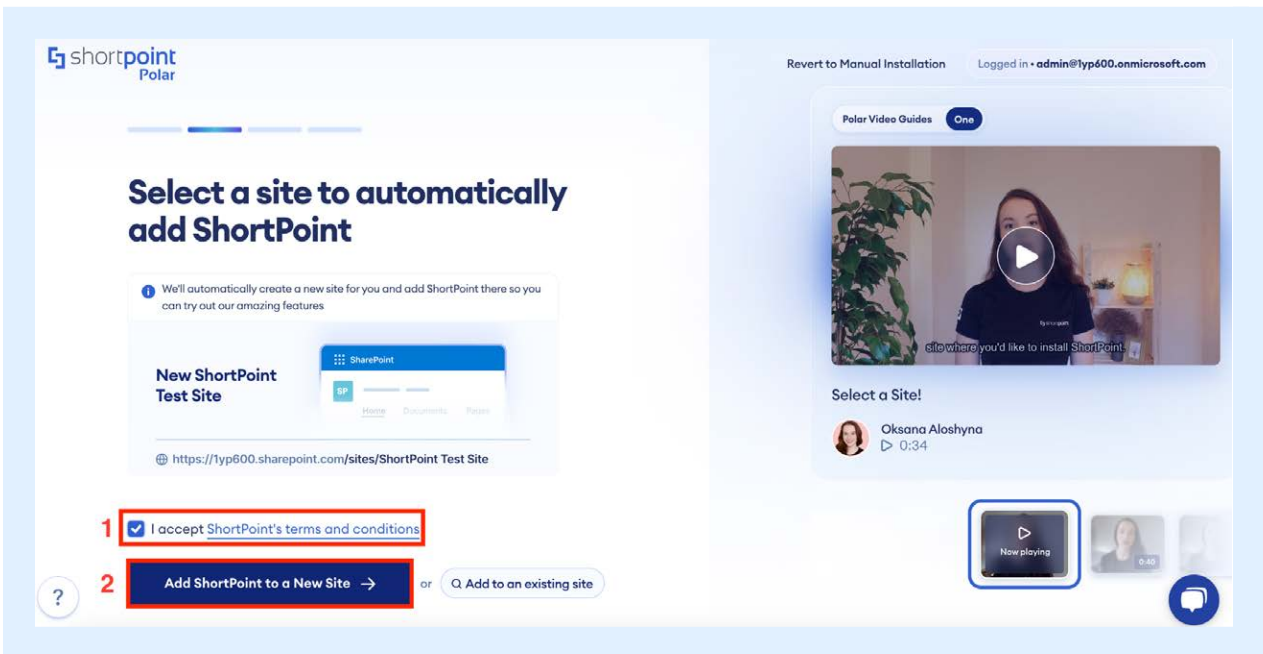


Figure 3.12 Terms and Conditions and Add to a New Site Button

Click **Continue**:

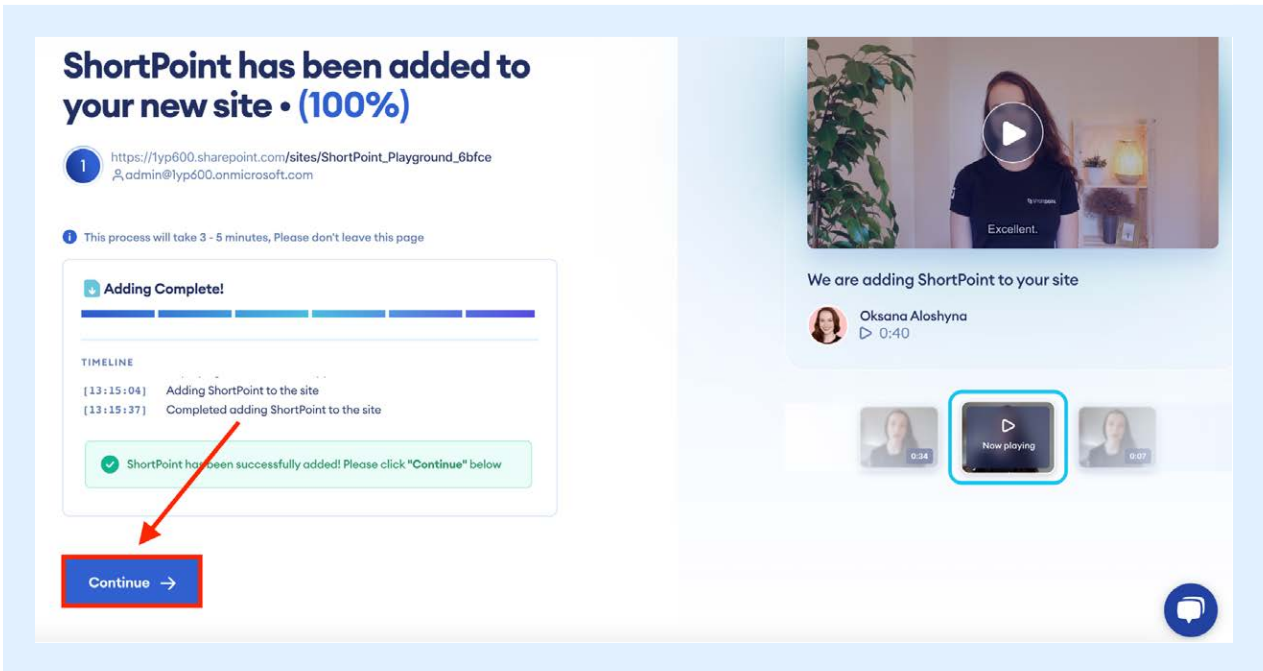


Figure 3.13 Continue Button

Then, click **Complete Installation**:

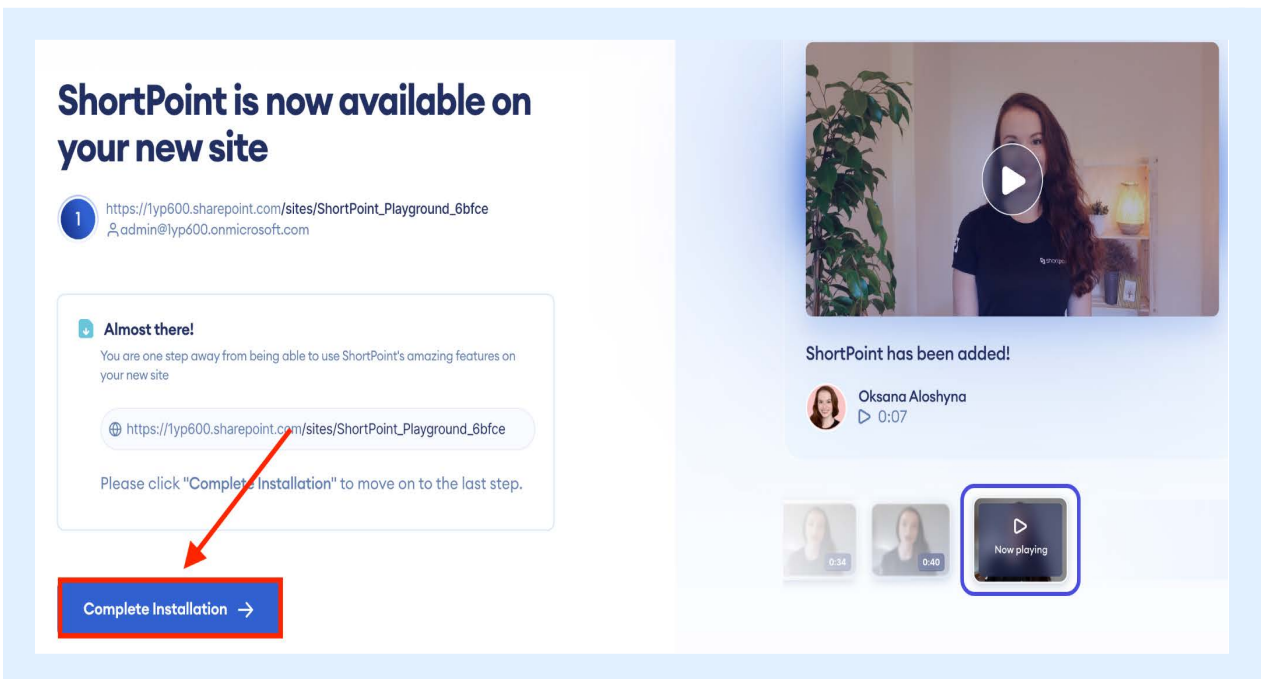


Figure 3.14 Complete Installation Button

ShortPoint will be installed to your SharePoint site. Once done, you will see the notification below. Click **Start Designing**:

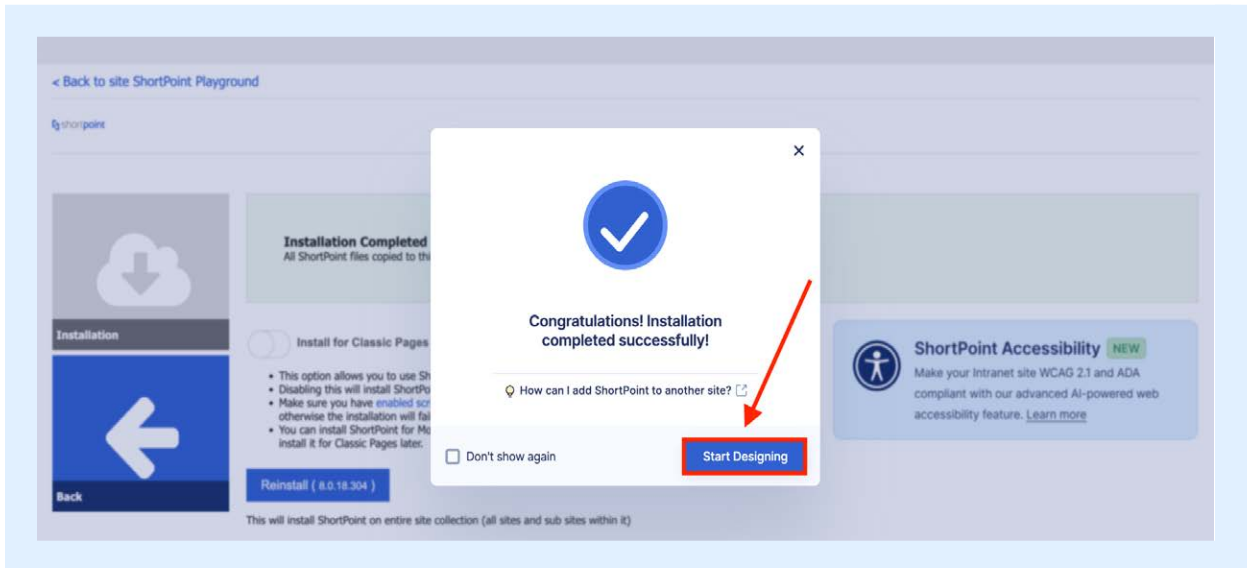


Figure 3.15 Start Designing Button

Congratulations! You have successfully installed ShortPoint using ShortPoint Automated Installation. You will be redirected to a SharePoint page where you can now start designing :

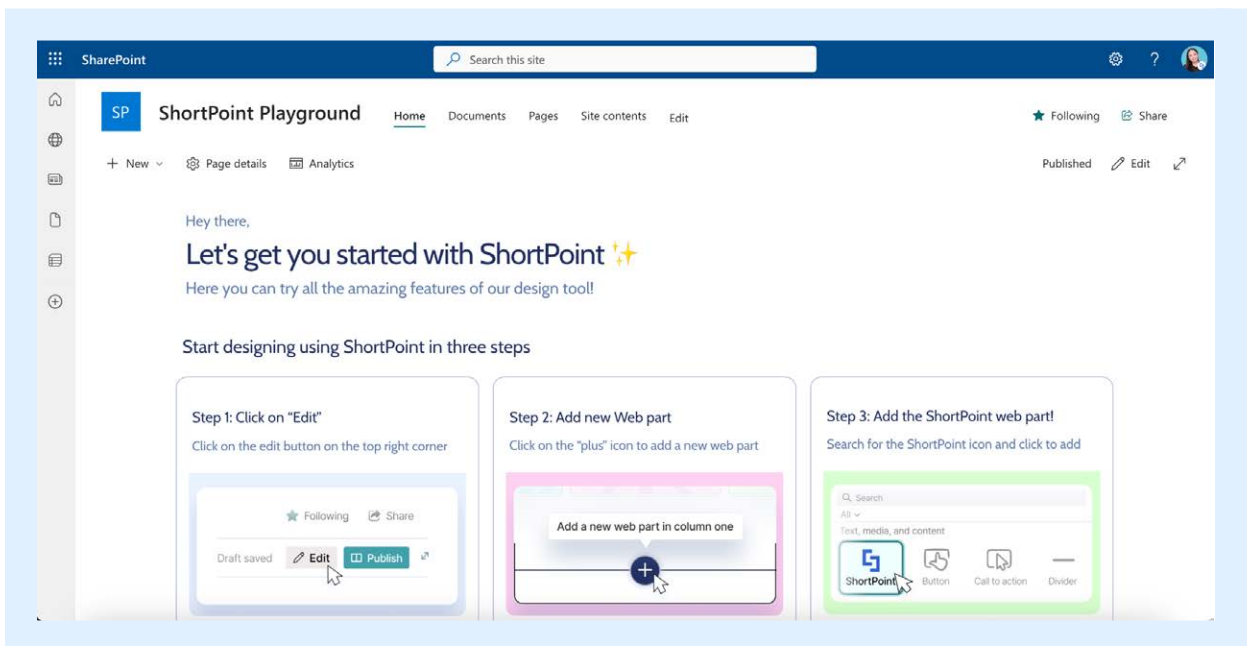


Figure 3.16 Successfully installed ShortPoint SPFx

Section 4

Manual Installation

This section details all the steps you need to do in order to manually install ShortPoint SPFx.

4.1 Pre-requisite Steps

There are two pre-requisite steps you need to follow before installing ShortPoint SPFx manually. Follow the pre-requisites below:

4.1.1 Pre-requisite Step 1: Submit the Trial Request Form

Go to shortpoint.com and select **Download**:

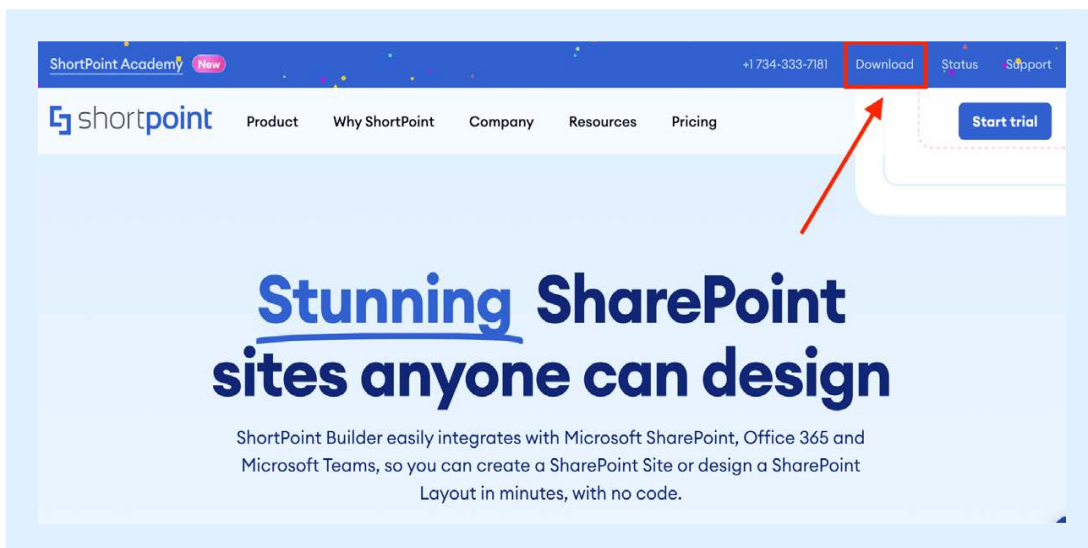


Figure 4.1.1.1 Download button

Scroll down and choose **Microsoft 365**:



Figure 4.1.1.2 Microsoft 365

Click **Install ShortPoint SPFx for Microsoft 365**:



Figure 4.1.1.3 Download button

Select whether you are a new or existing customer. For this guide, we will select New Customer:

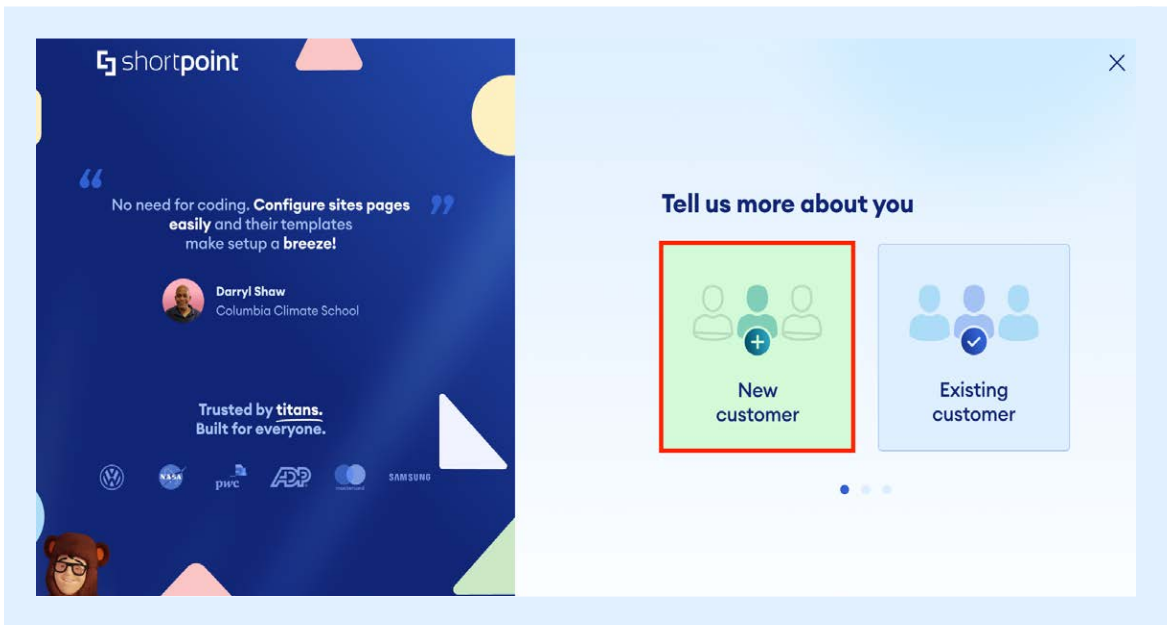


Figure 4.1.1.4 New or Existing customer selection

Fill the necessary fields and click **Next**:

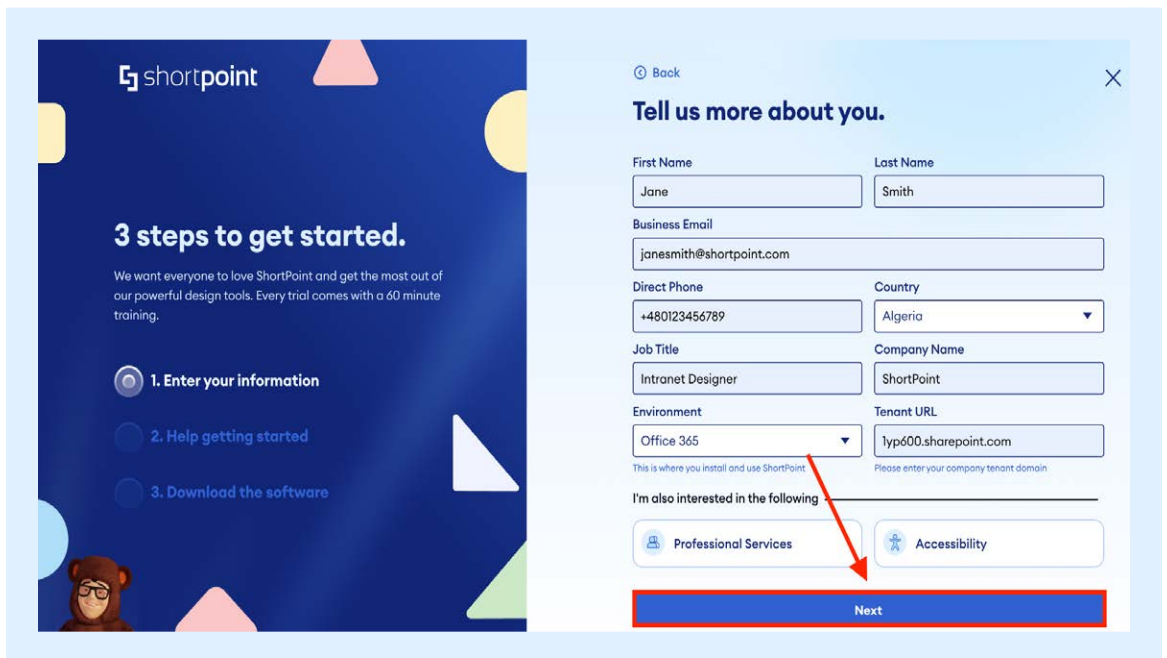


Figure 4.1.1.5 Fill the form

(Optional) If you want to schedule a complimentary training from a ShortPoint expert, select your preferred **training date**:

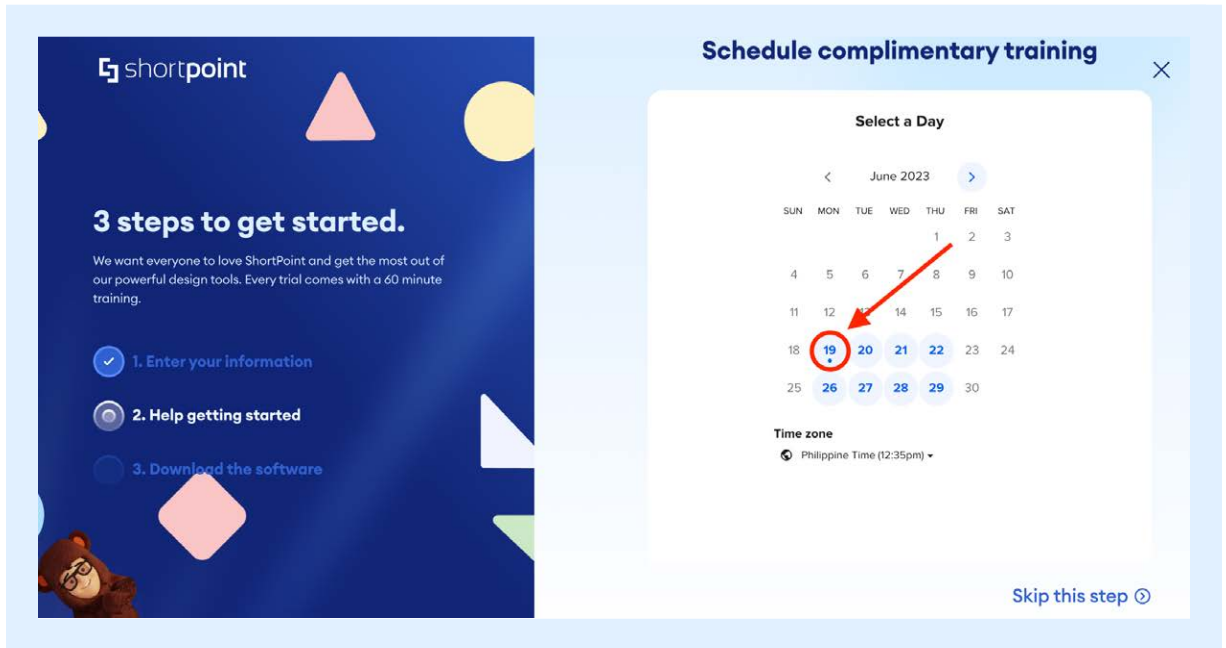


Figure 4.1.1.6 Select Training Date

(Optional) Then, select a training time and click **Next**:

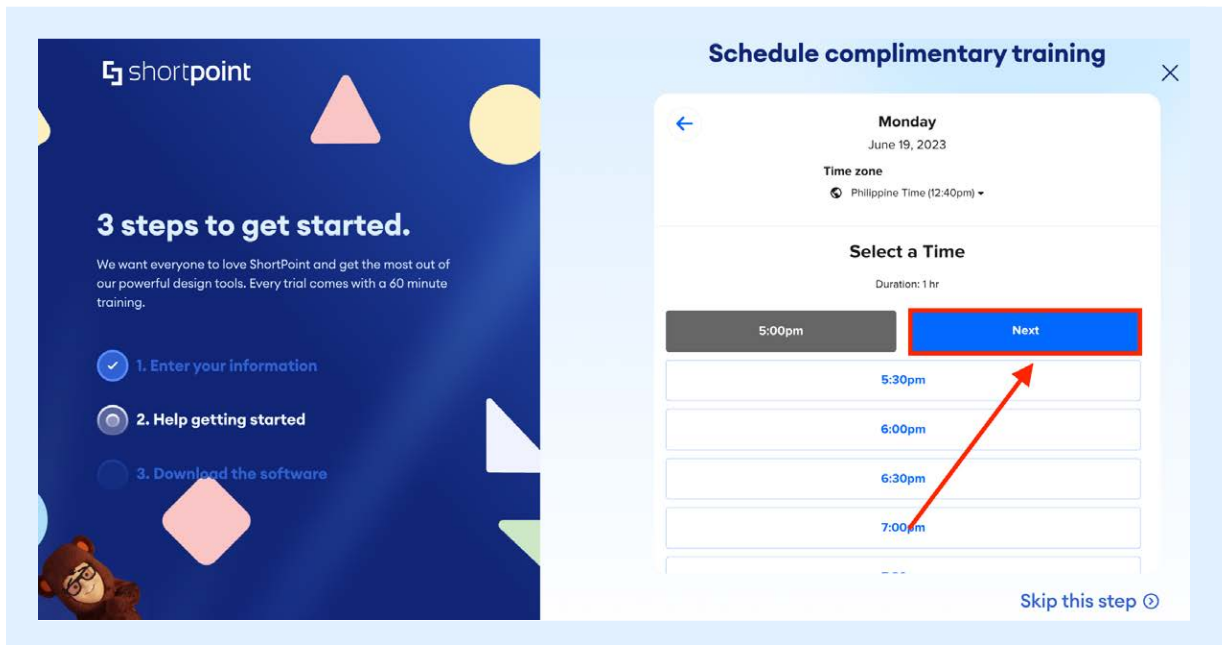


Figure 4.1.1.7 Select Training Time

(Optional) Once you have confirmed your training details, click **Schedule Event**:

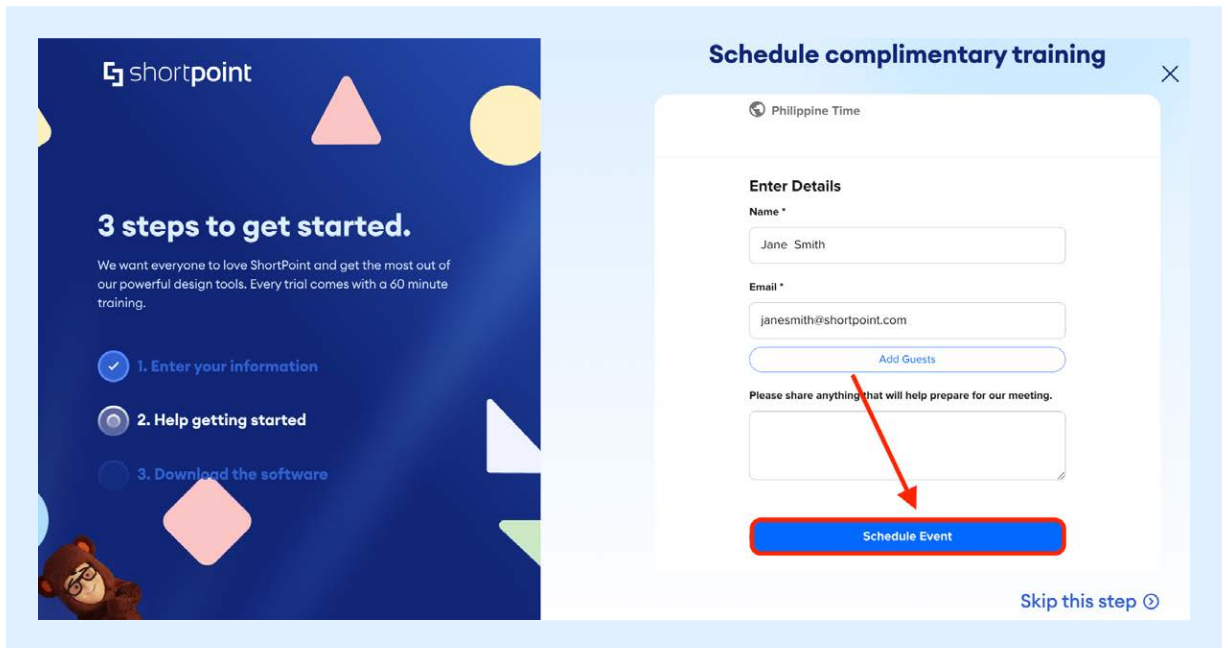


Figure 4.1.1.8 Schedule Event Button

Then, select **Start Installation**:

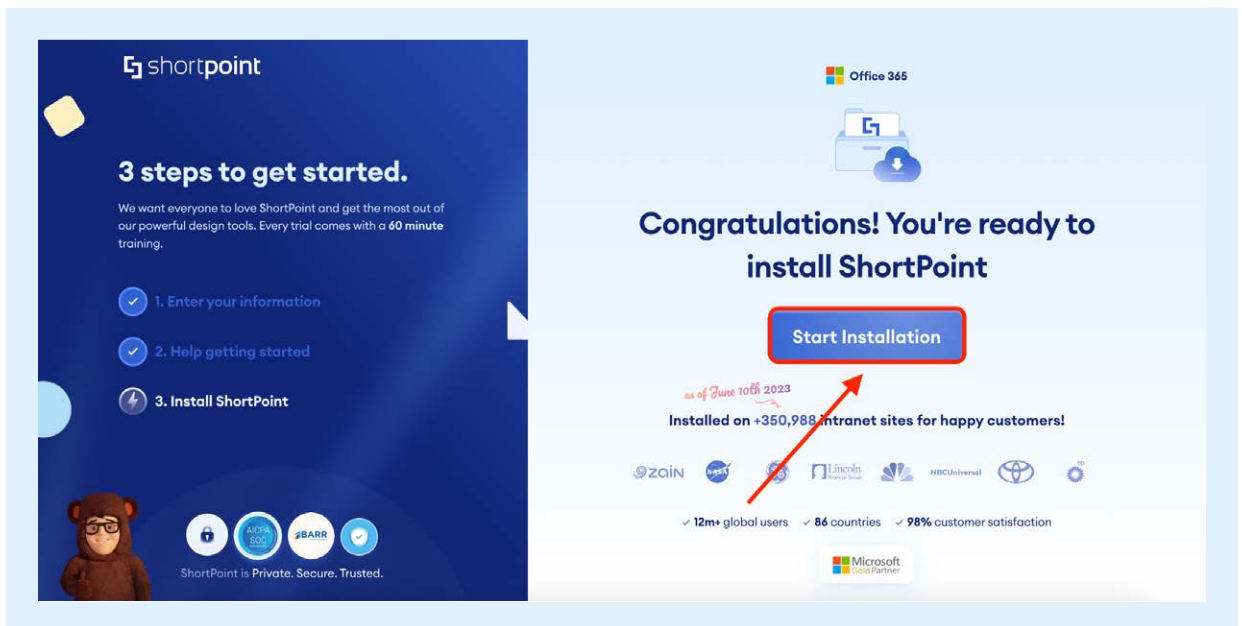


Figure 4.1.1.9 Start Installation button



You will be prompted to **log in to your Microsoft 365 account**. This does not install ShortPoint to your tenant yet, but is needed to check if you have the necessary permissions to install apps on your tenant:

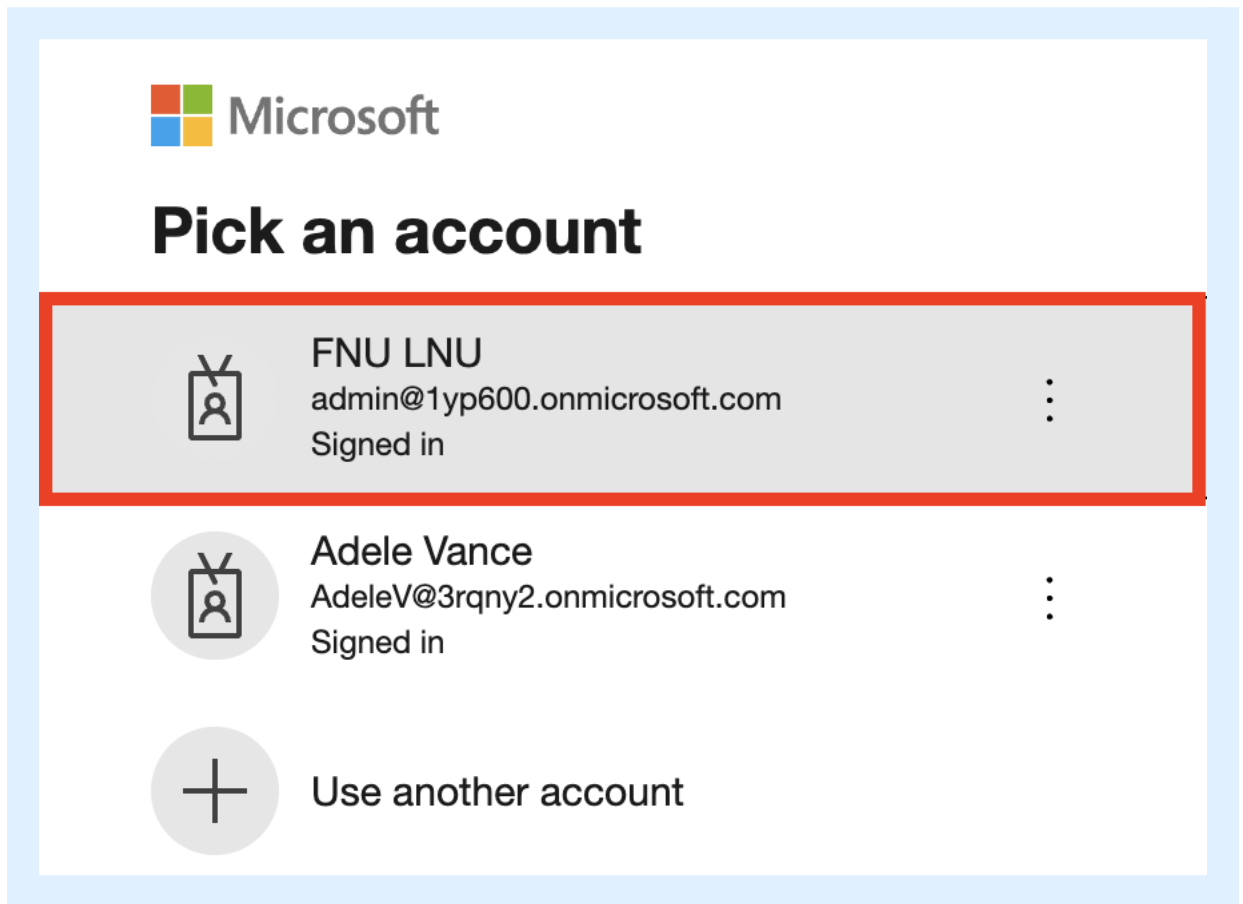


Figure 4.1.1.10 Login

NOTE: If you don't have the necessary permissions to install ShortPoint on your environment, you will be redirected to a page where you can request help from your SharePoint admins. At the same time, you will be able to try ShortPoint and its features using an interactive experience.

Select **Try Manual Installation:**

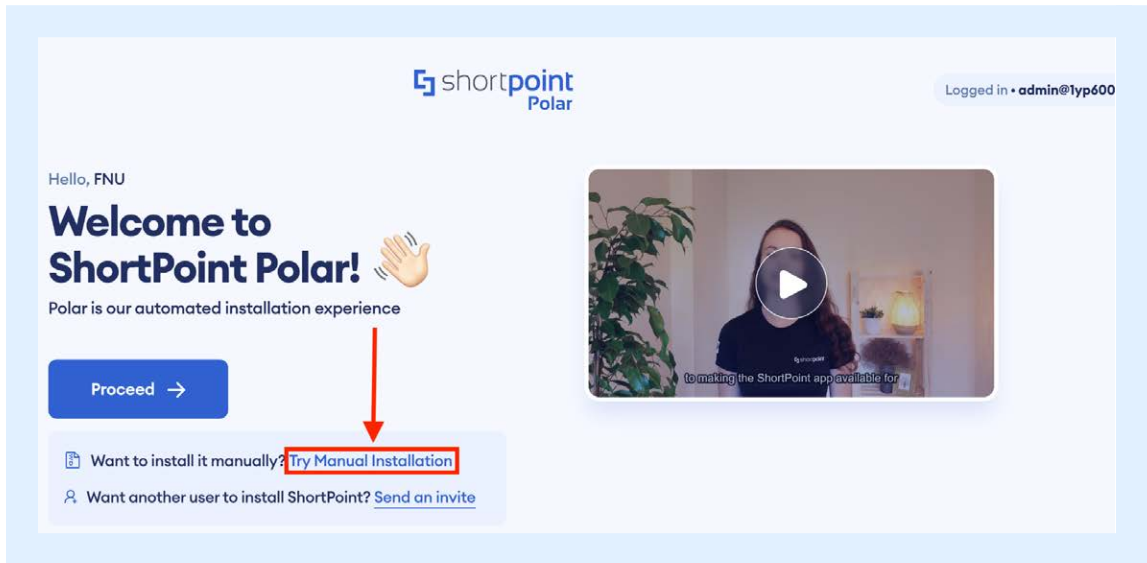


Figure 4.1.1.11 Try Manual Installation

Click **Manual Install:**

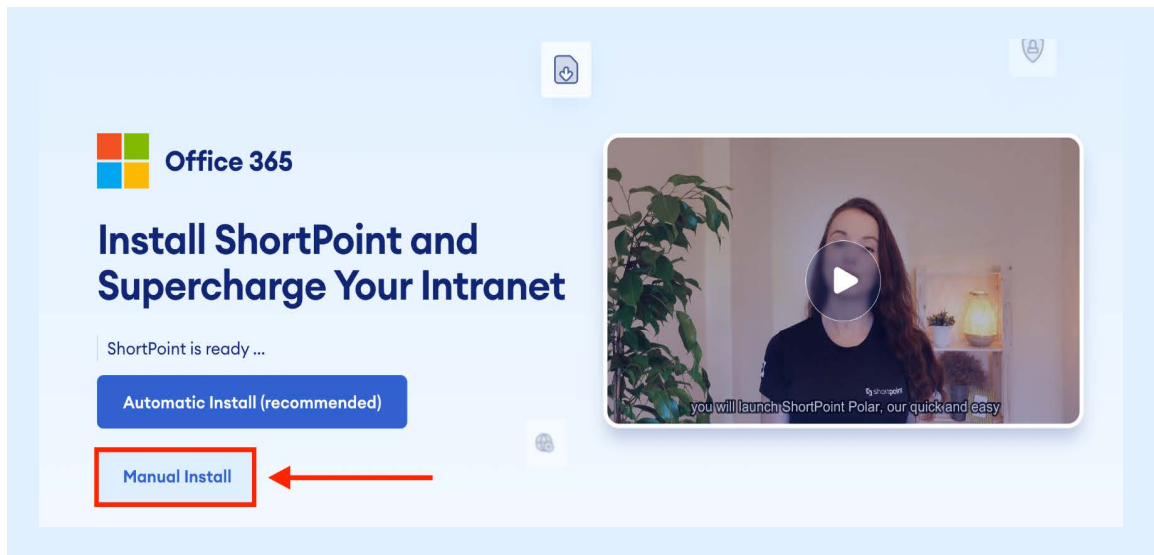


Figure 4.1.1.12 Manual Install button

Upon clicking Manual Install, ShortPoint SPFx will be automatically downloaded:

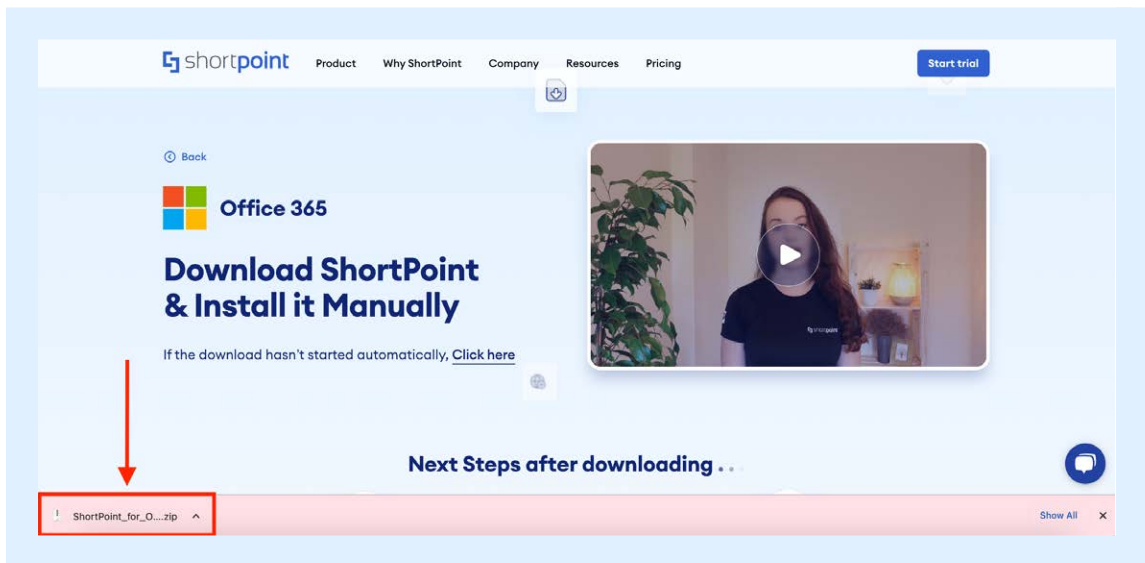


Figure 4.1.1.13 ShortPoint SPFx file

4.1.2 Pre-requisite Step 2: Extract the ShortPoint SPFx File

Click the zip file to open it:

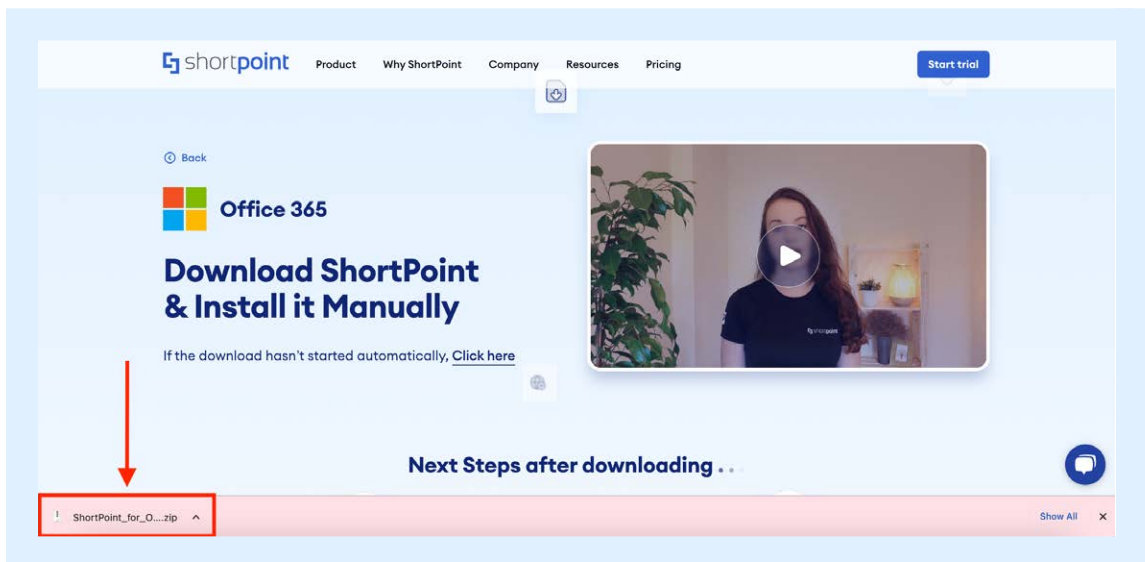


Figure 4.1.2.1 ShortPoint SPFx fi

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

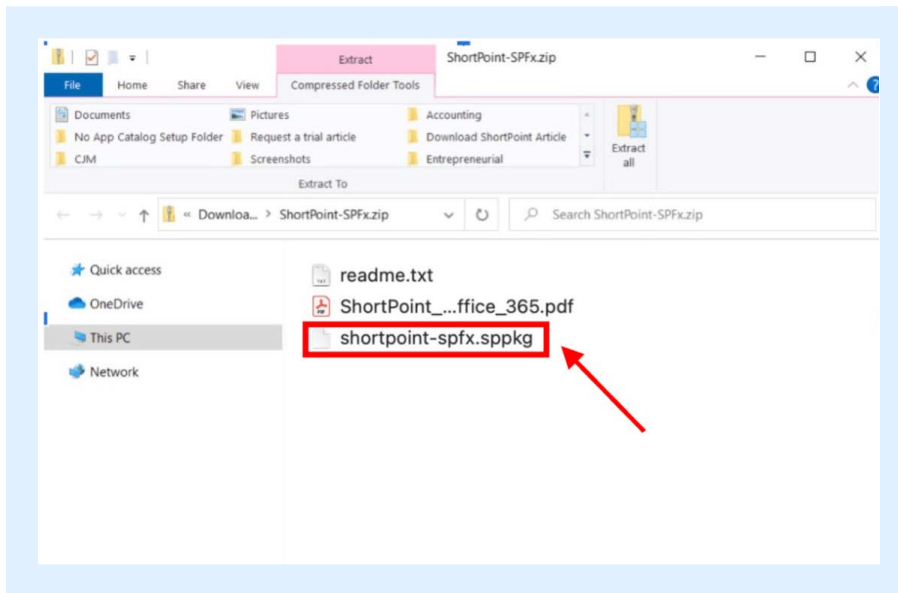


Figure 4.1.2.2 The shortpoint-spx.sppkg file

At 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:

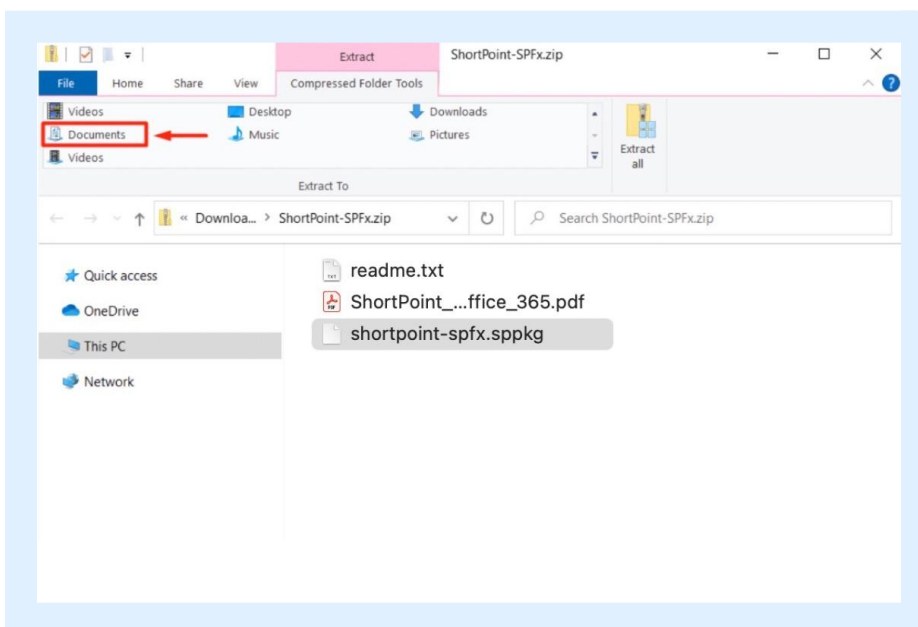


Figure 4.1.2.3 Selecting a folder to the extract shortpoint-spx.sppkg file

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:

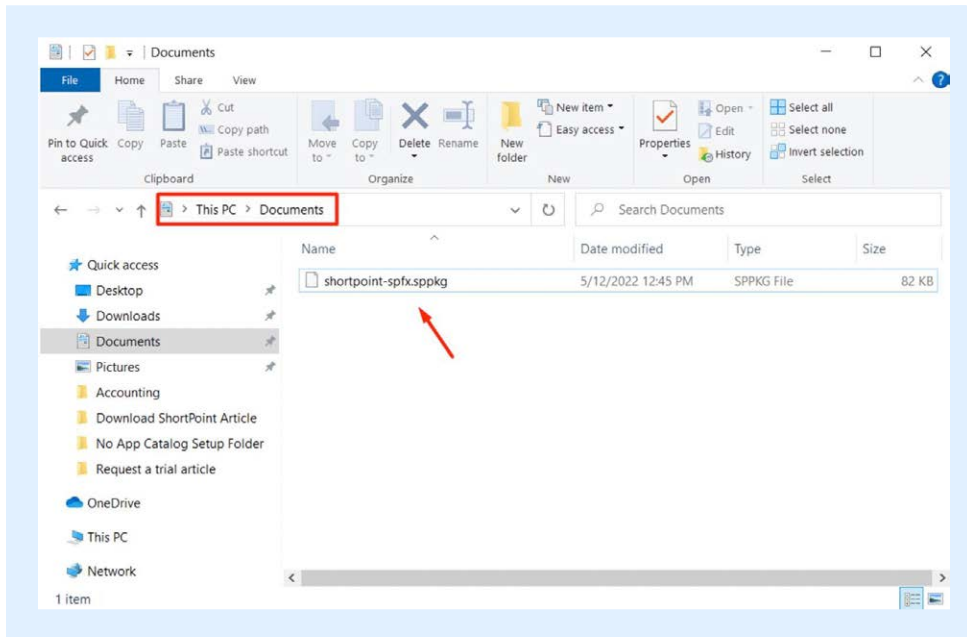


Figure 4.1.2.4 Checking the extracted shortpoint-spx.sppkg file

4.2 Installation Steps

There are three installation steps for Manual Installation. Follow the step-by-step guide below:

4.2.1 Installation Step 1: Upload ShortPoint SPFx File to the Tenant App Catalog

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

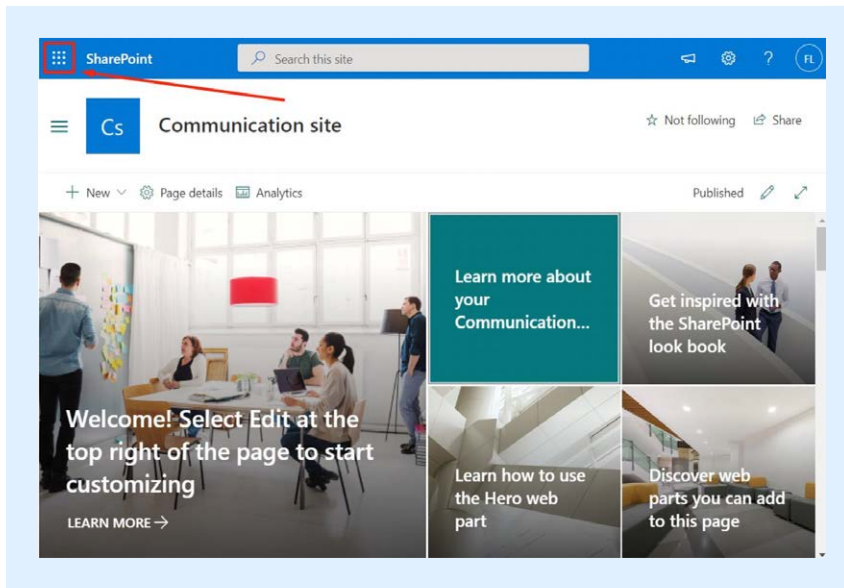


Figure 4.2.1.1 App Launcher Icon

Select **Admin**:

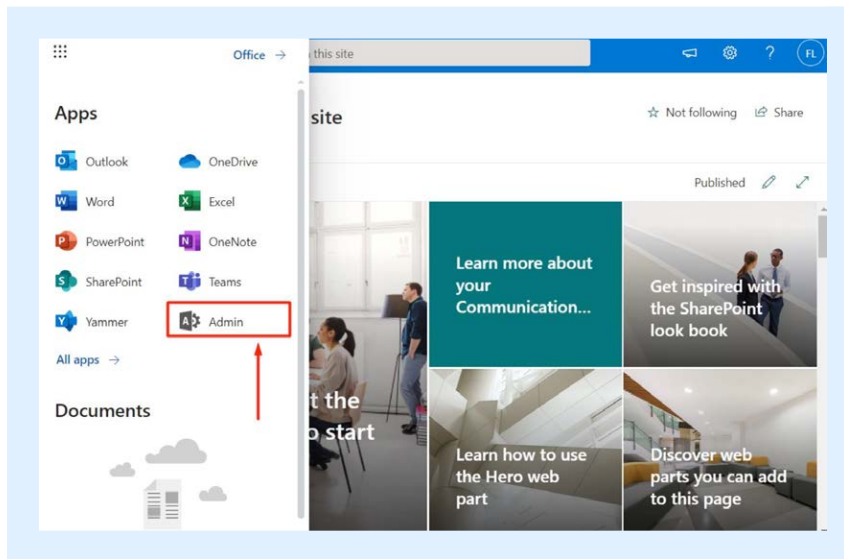


Figure 4.2.1.2 Admin button



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

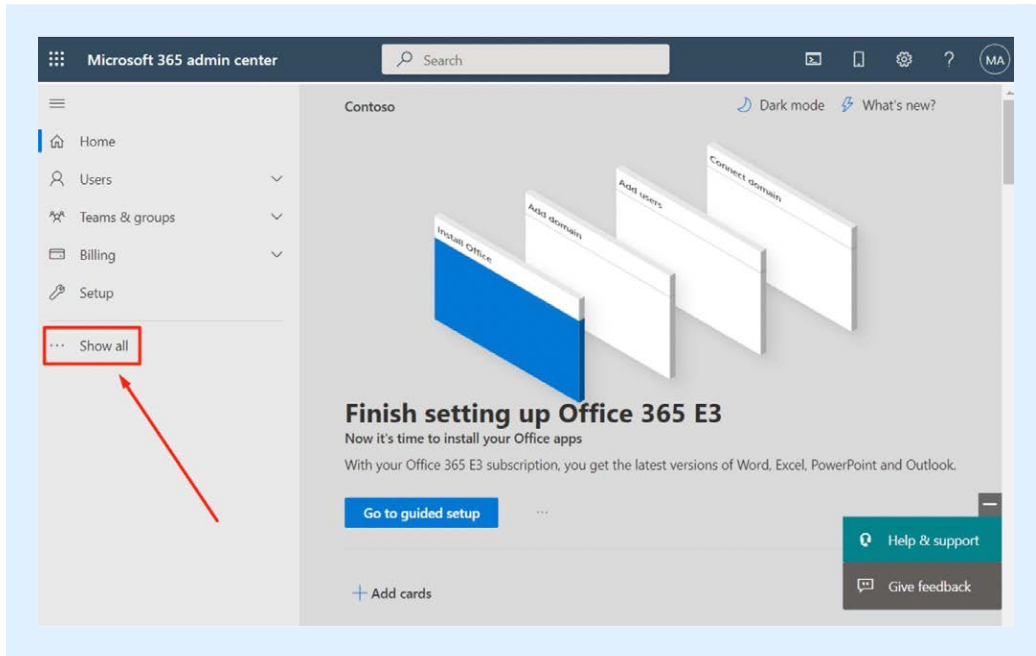


Figure 4.2.1.3 ...Show All button

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

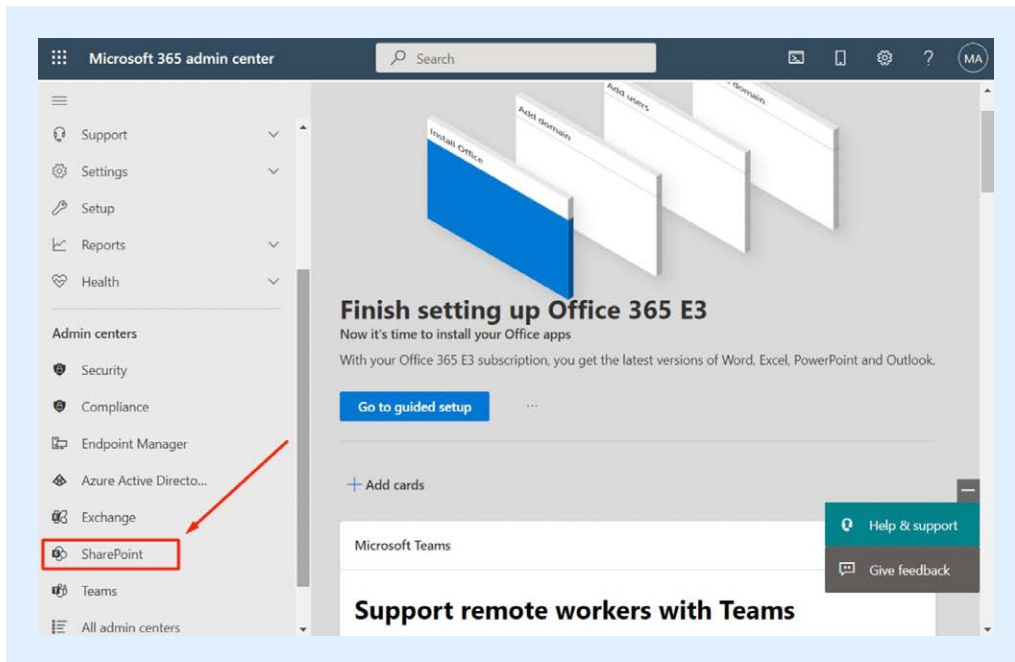


Figure 4.2.1.4 SharePoint button

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

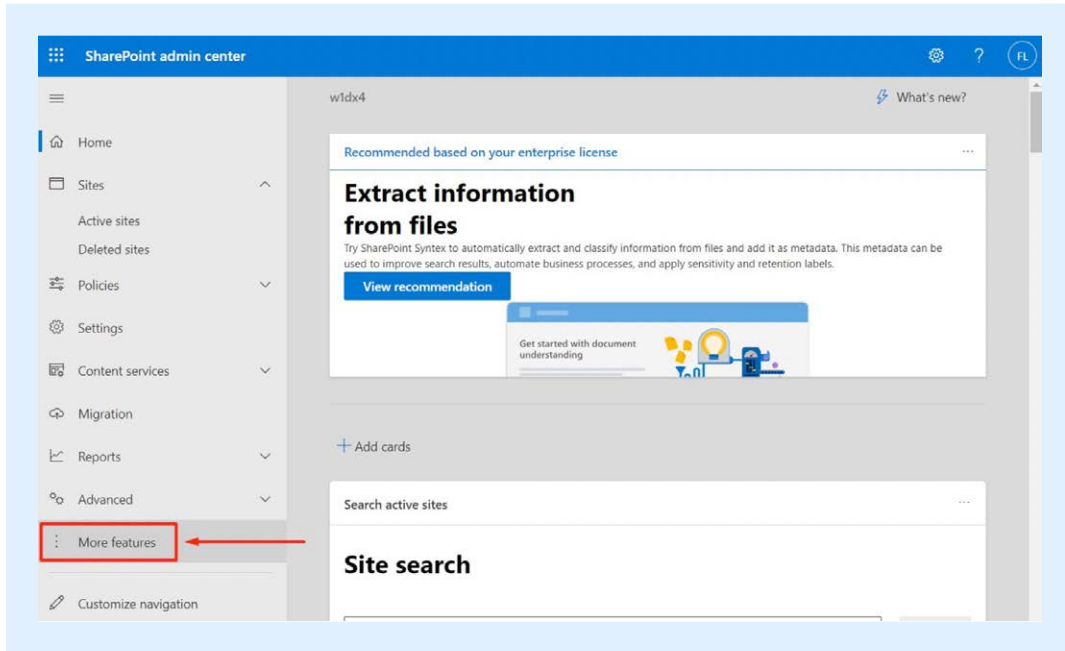


Figure 4.2.1.5 More Features button

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

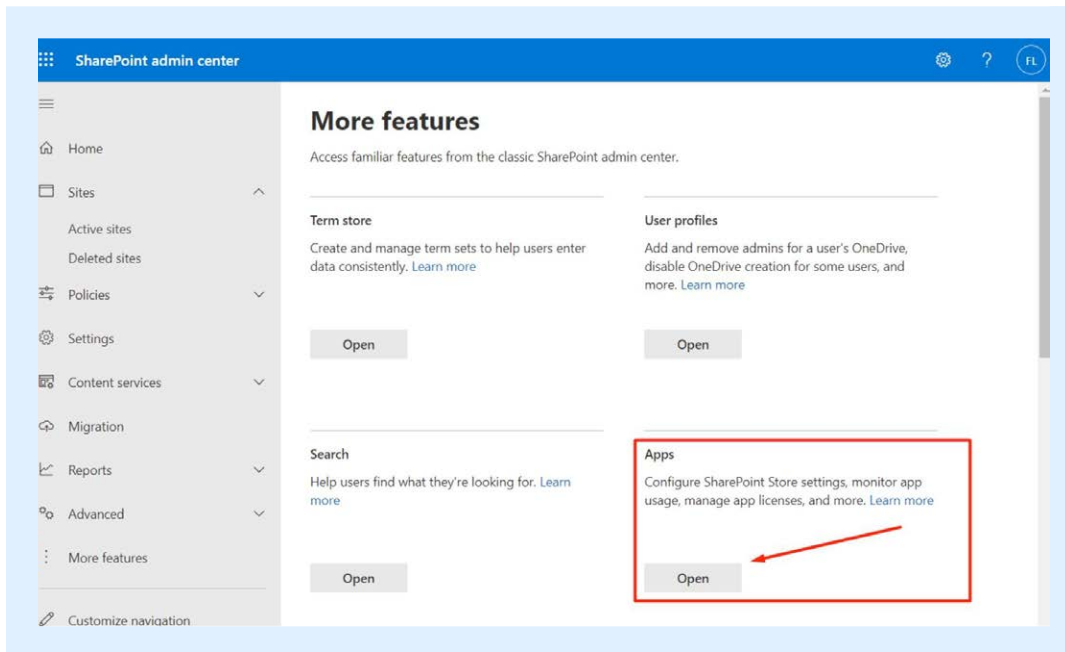


Figure 4.2.1.6 Apps section

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

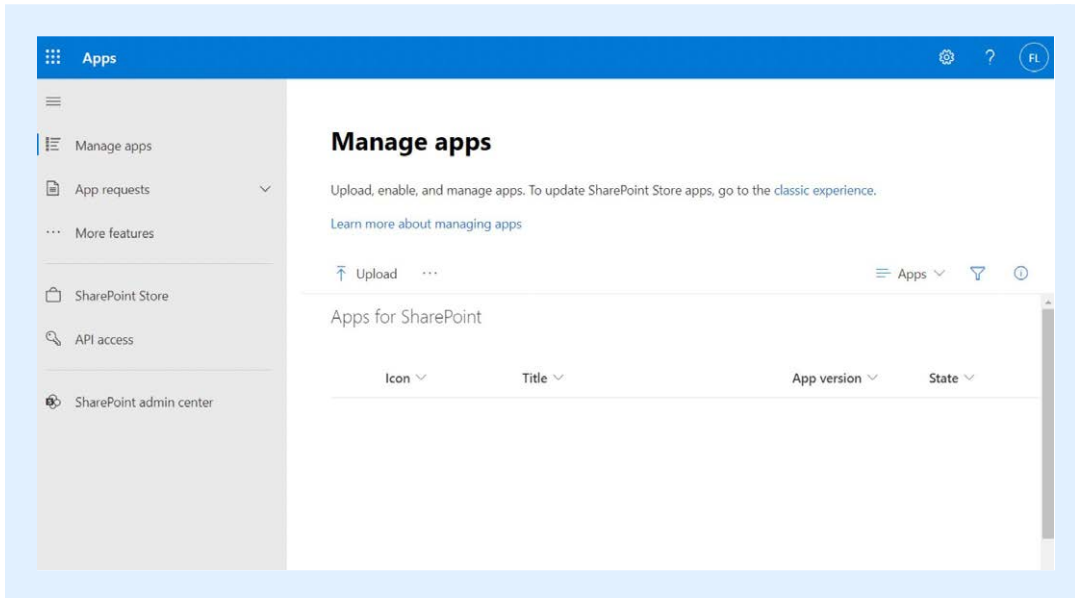


Figure 4.2.1.7 App Catalog

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

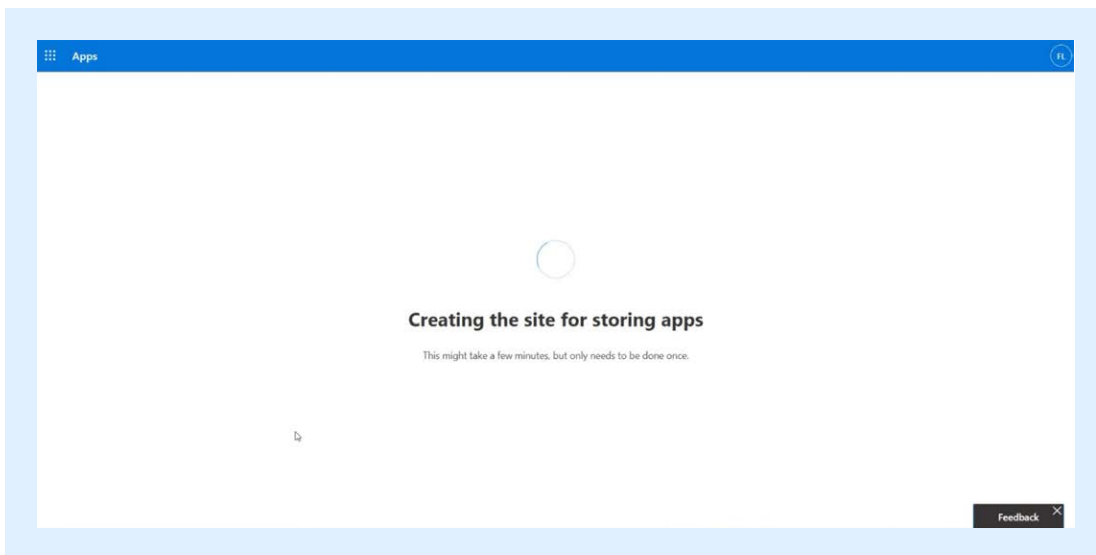


Figure 4.2.1.8 App Catalog creation

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

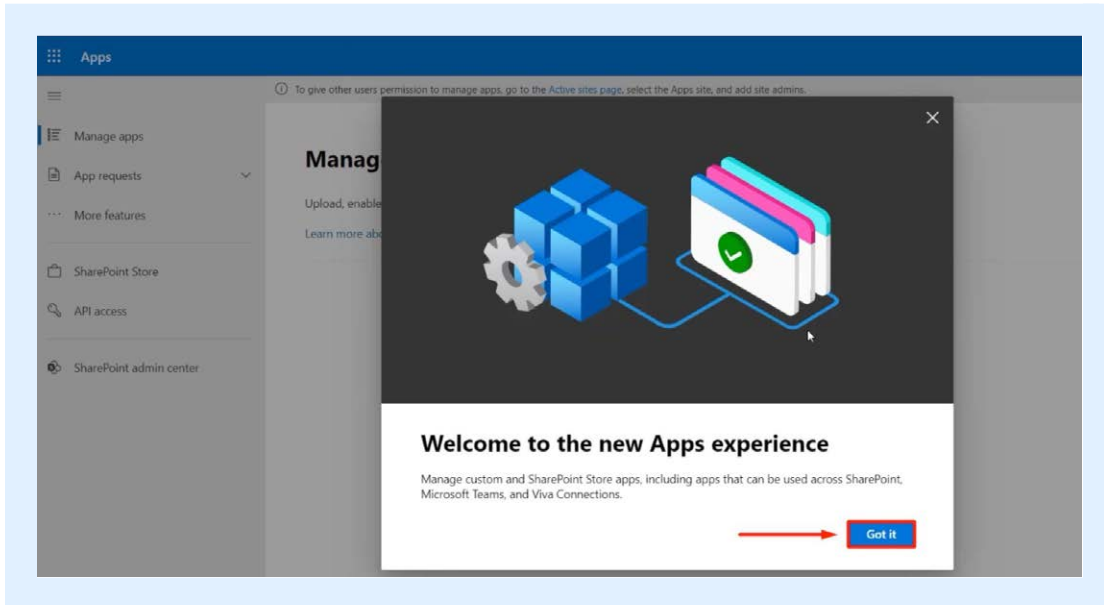


Figure 4.2.1.9 Welcome message for App Catalog

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

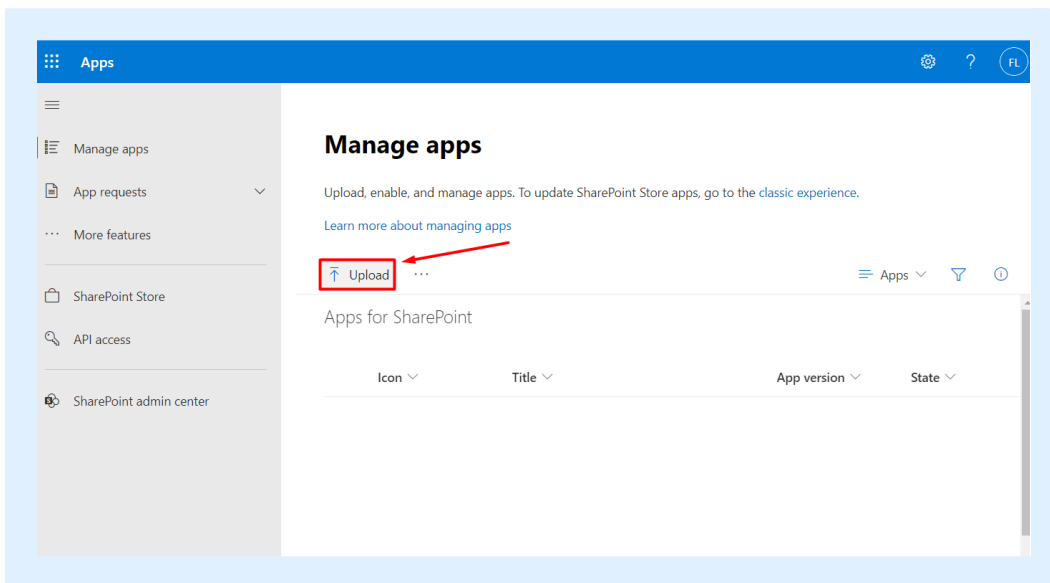


Figure 4.2.1.10 Upload button in App Catalog

Find the shortpoint-spx.sppkg file you extracted earlier and click **Open**:

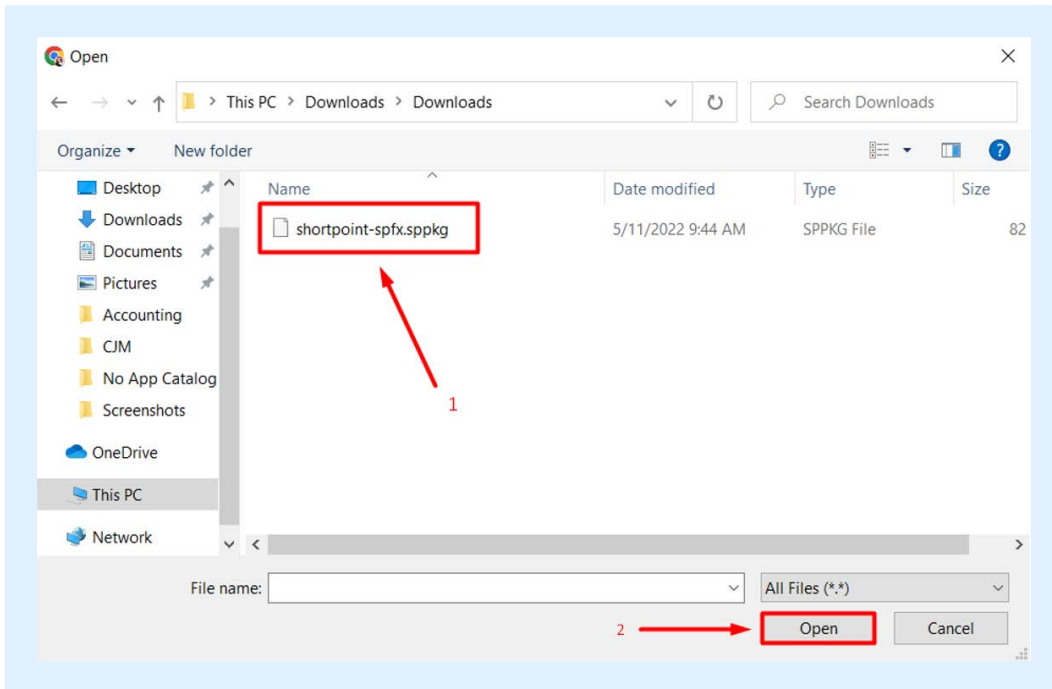


Figure 4.2.1.11 Uploading shortpoint-spx.sppkg file

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

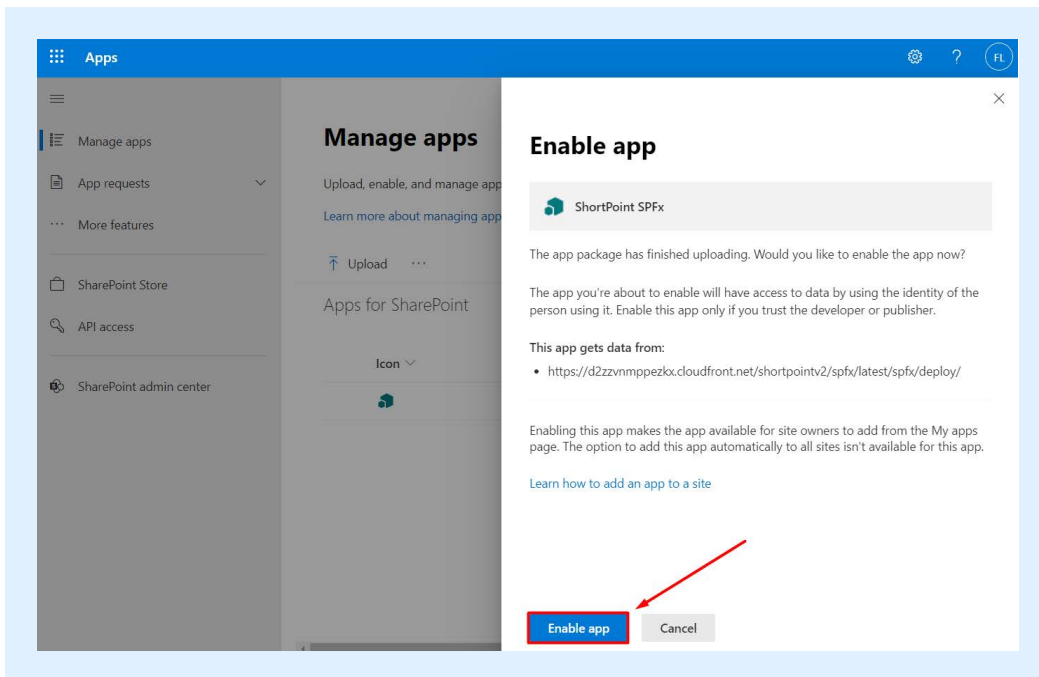


Figure 4.2.1.12 Enable app button

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

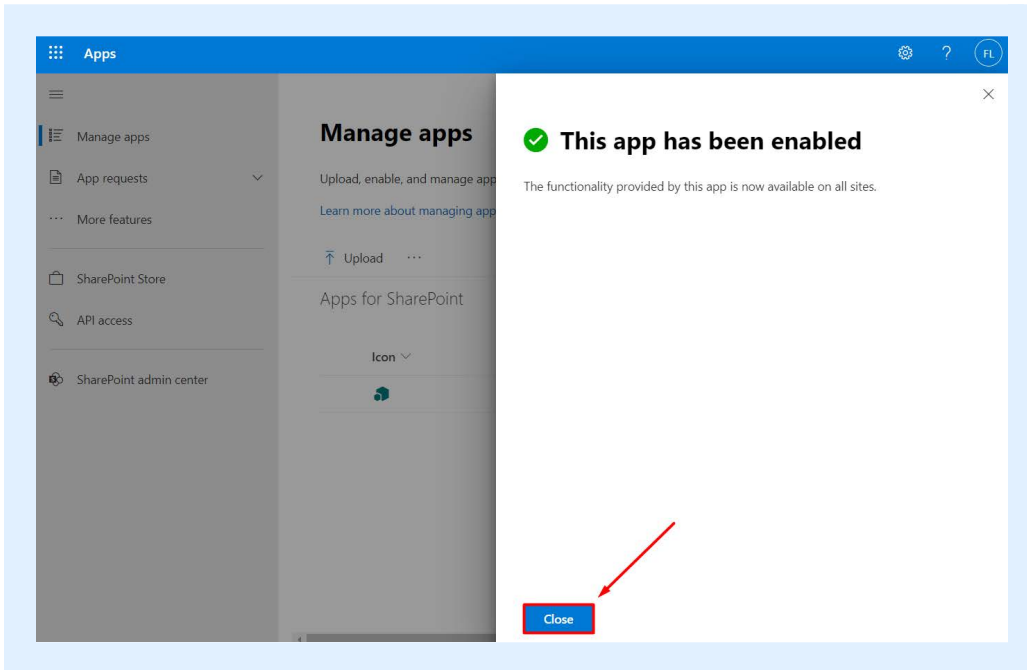


Figure 4.2.1.13 Close button

You will now see ShortPoint SPFx on your App catalog:

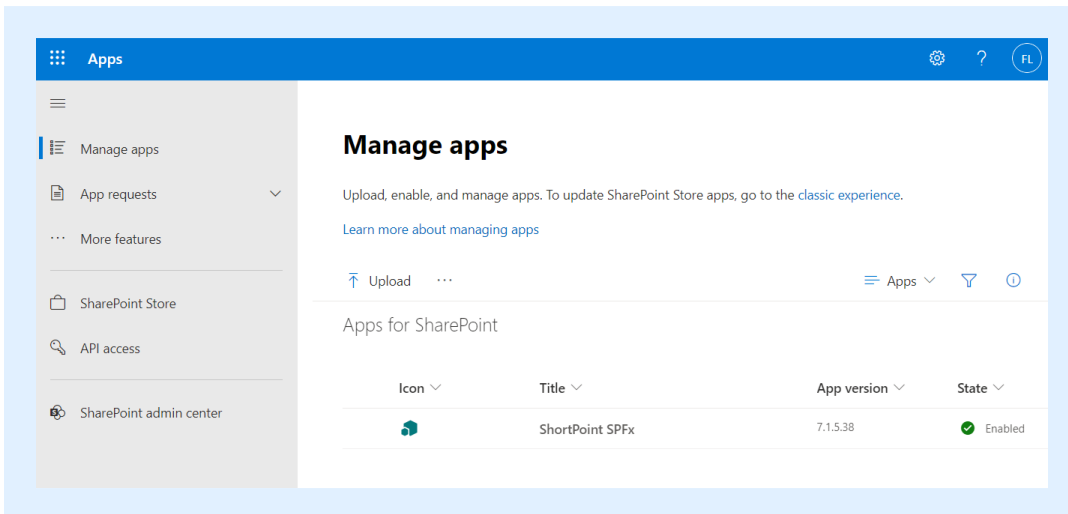


Figure 4.2.1.14 ShortPoint SPFx app in the App Catalog

4.2.2 Installation Step 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:

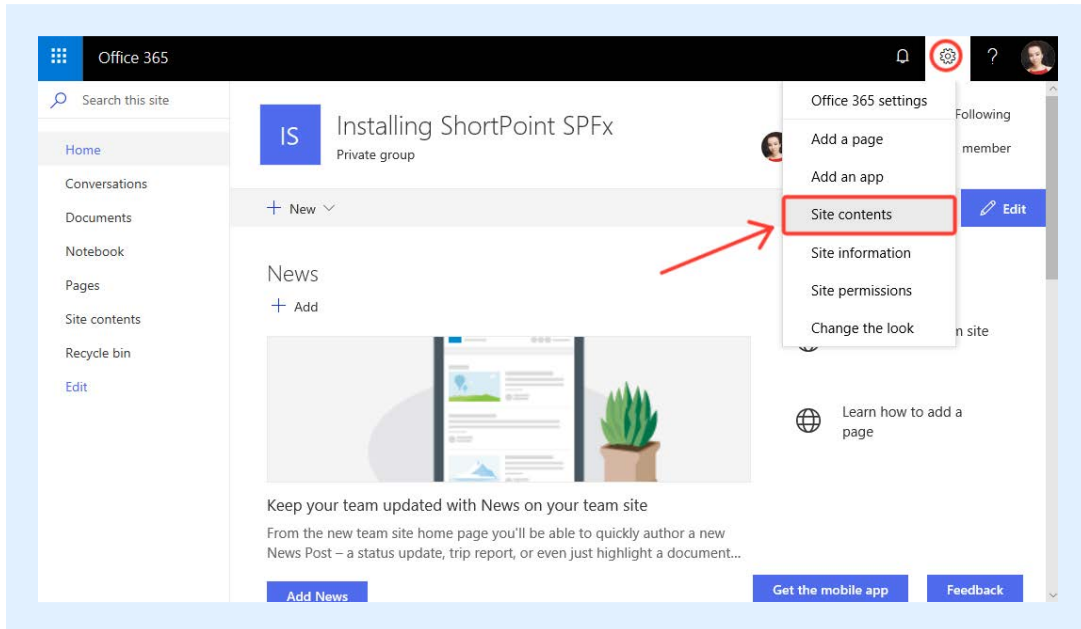


Figure 4.2.2.1 Site contents button

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

4.2.2.1 Modern Experience

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

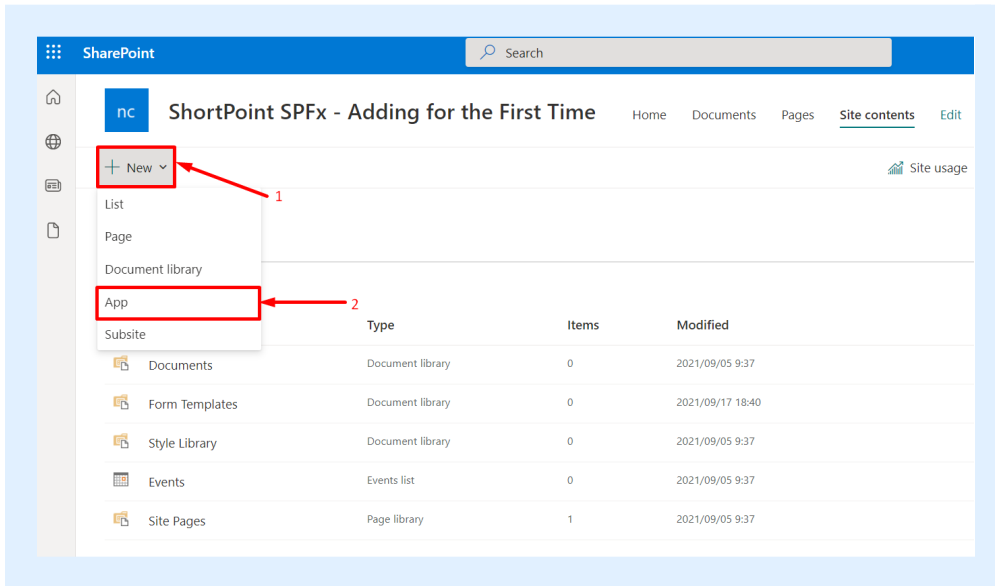


Figure 4.2.2.1.1 Adding an App to Site Contents (Modern Experience)

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

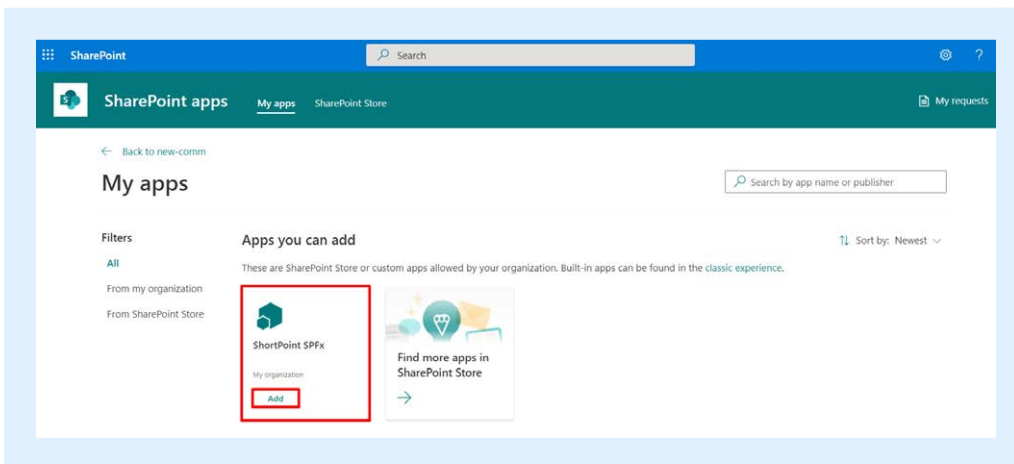


Figure 4.2.2.1.2 Add button (Modern experience)



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

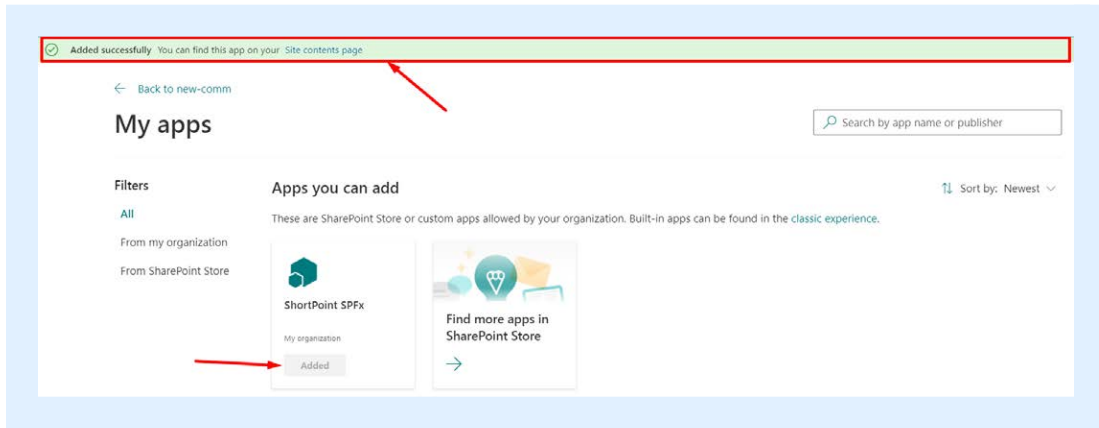


Figure 4.2.2.1.3 Site contents page button (Modern experience)

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:

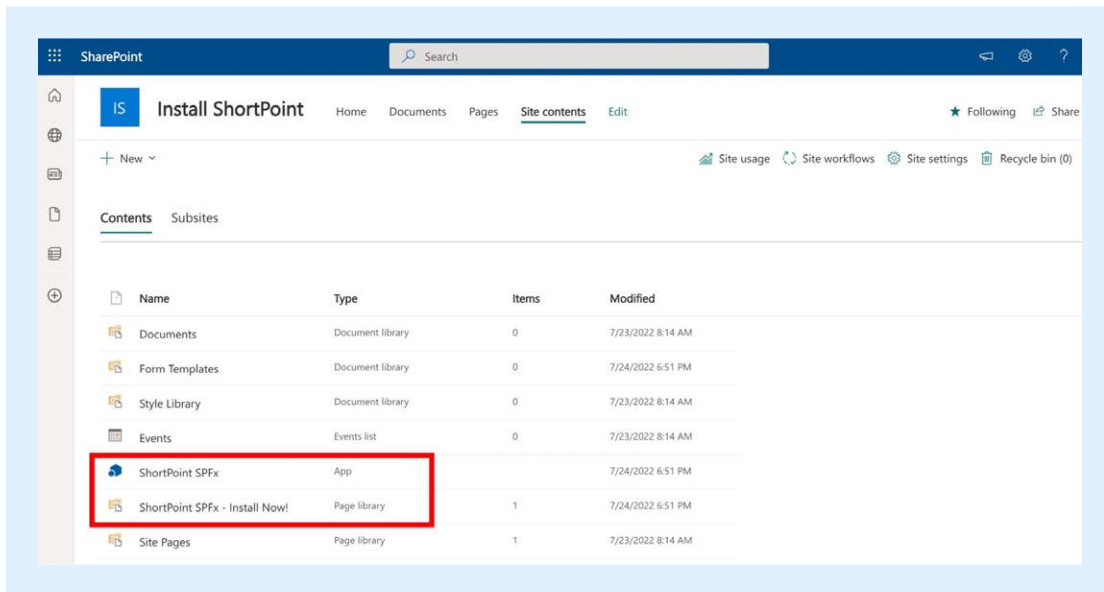


Figure 4.2.2.1.4 ShortPoint SPFx app and ShortPoint SPFx - Install Now! (Modern experience)

4.2.2.2 Classic Experience

Click **Add an app**:

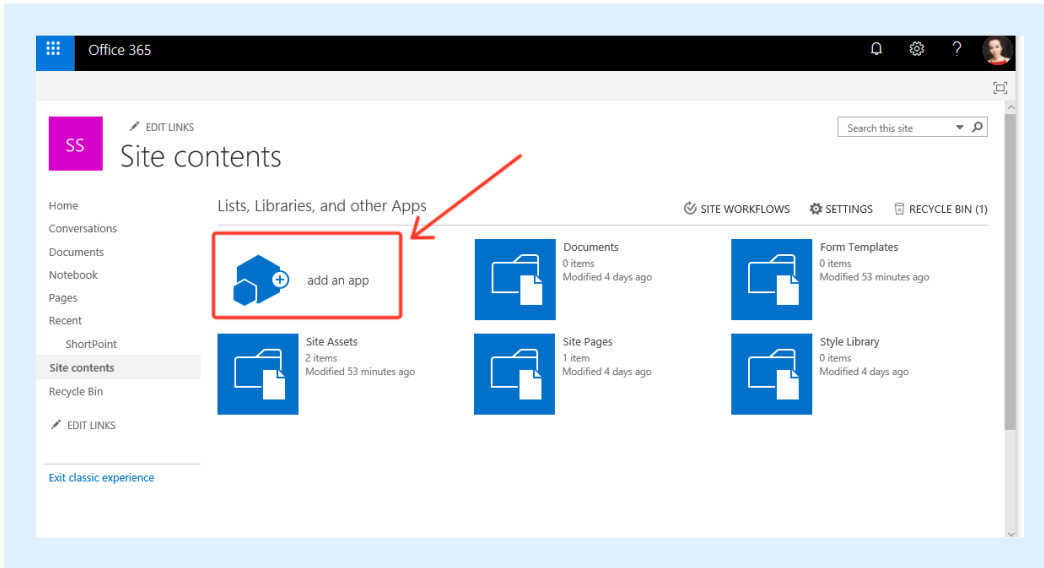


Figure 4.2.2.2.1 Add an app button (Classic experience)

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

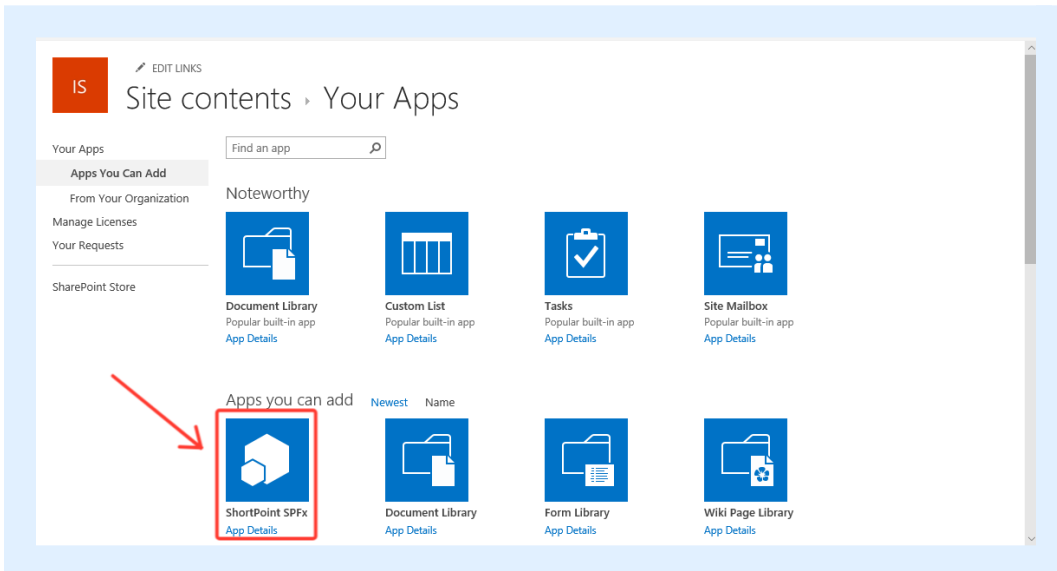


Figure 4.2.2.2.2 ShortPoint SPFx button (Classic experience)

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:

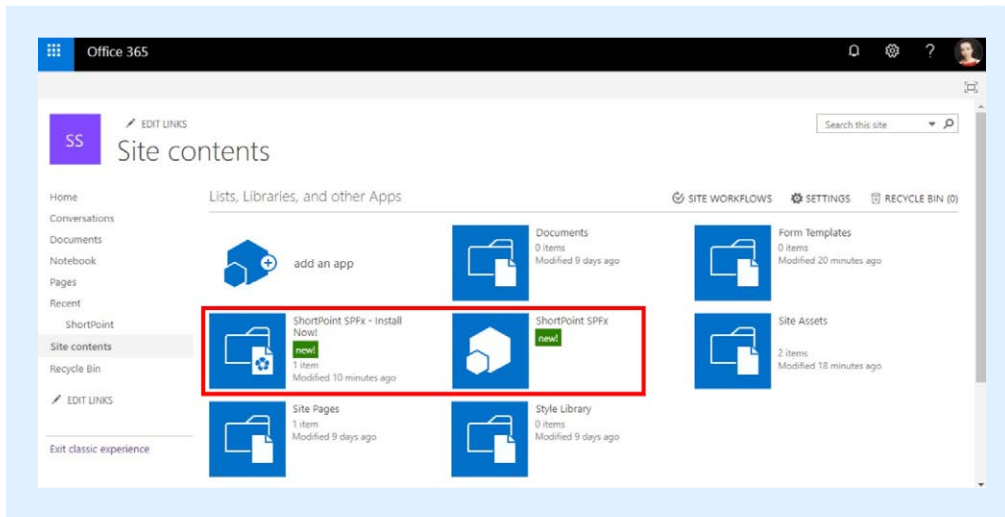


Figure 4.2.2.2.3 ShortPoint SPFx and ShortPoint SPFx - Install Now! (Classic experience)

4.2.3 Installation Step 3: Add ShortPoint SPFx to Site Contents

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

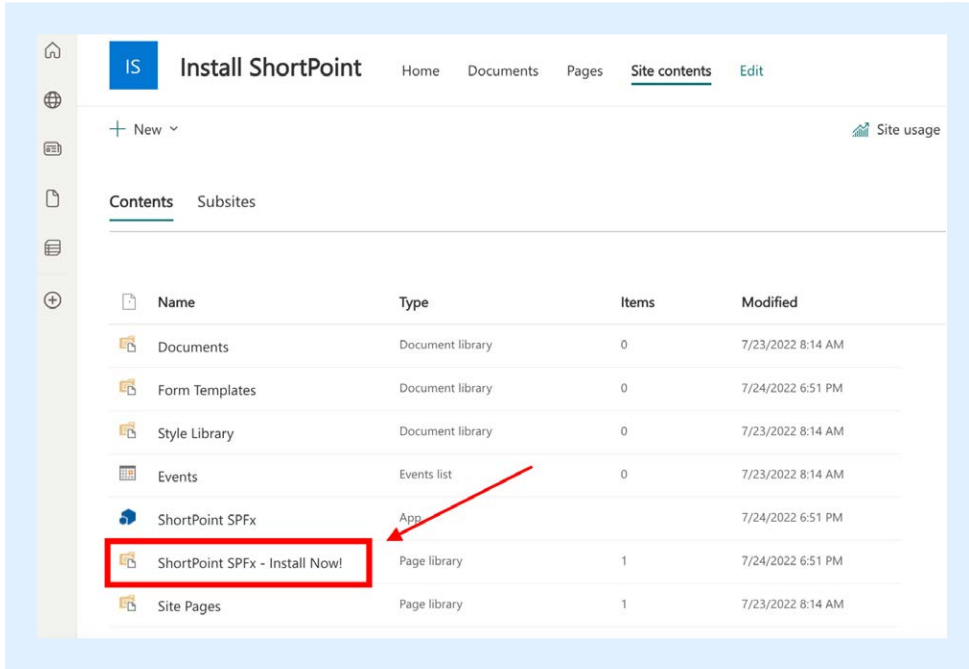


Figure 4.2.3.1 ShortPoint SPFx - Install Now! (Modern experience)

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

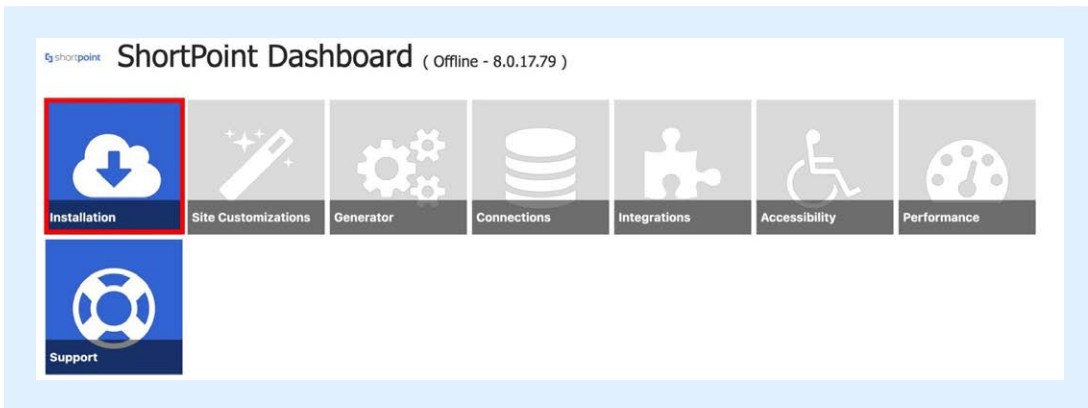


Figure 4.2.3.3 Installation button in the ShortPoint Dashboard

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**:

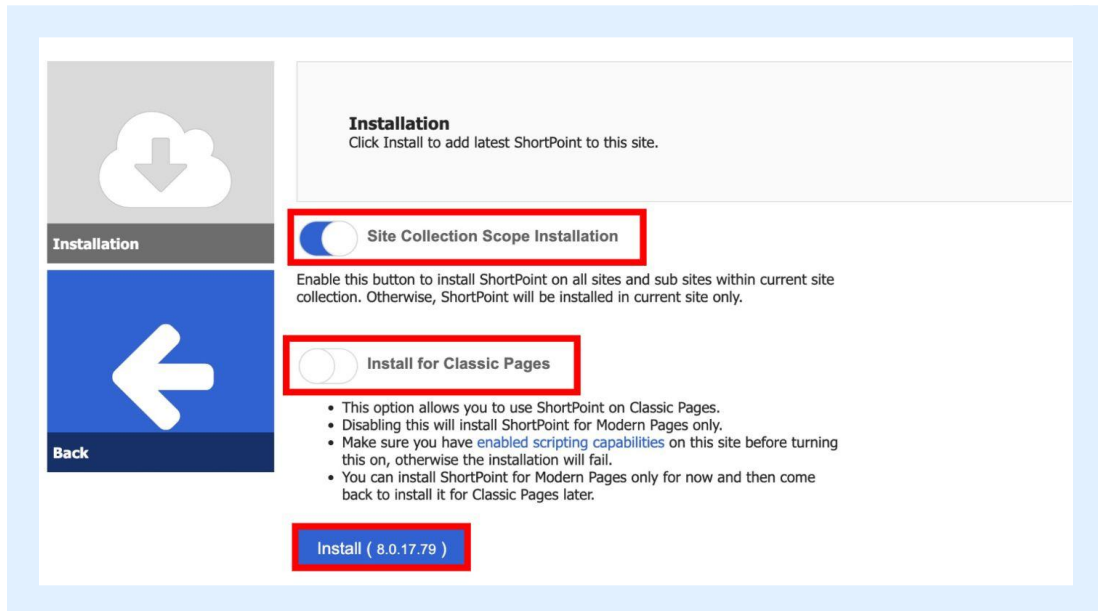


Figure 4.2.3.4 Site Collection Scope Installation and Classic Page Installation

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:

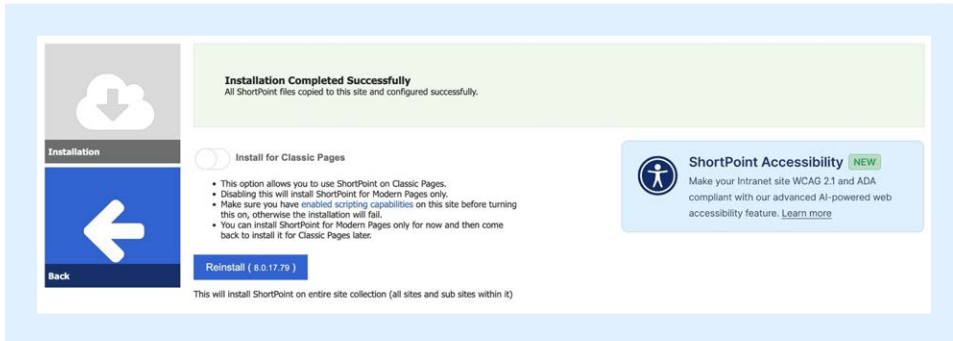


Figure 4.2.3.5 Installation completed successfully message

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

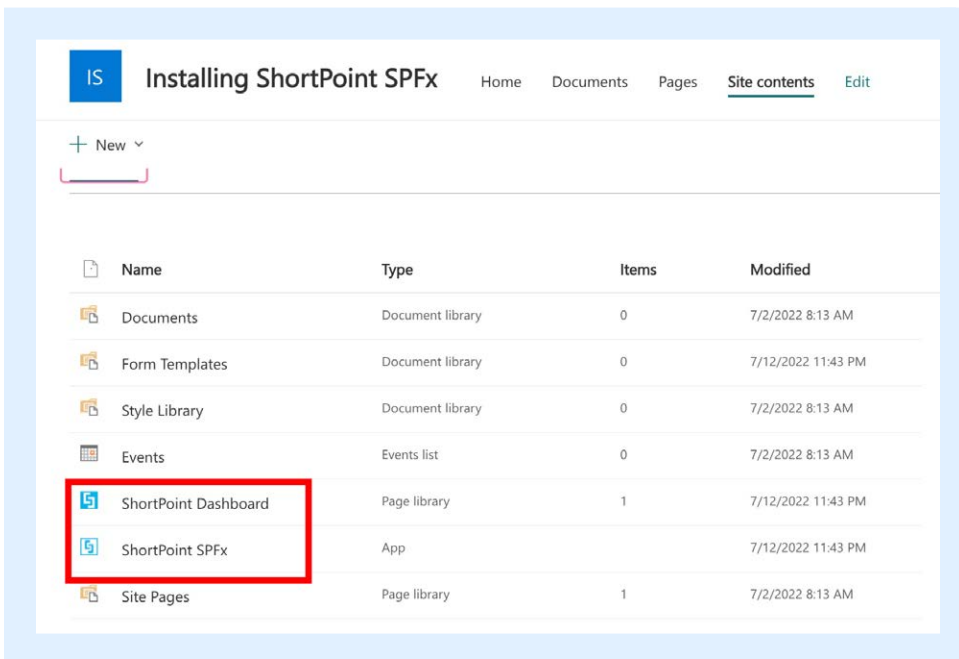


Figure 4.2.3.6 ShortPoint Dashboard and ShortPoint SPFx in the Site Contents page

Section 5

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**:

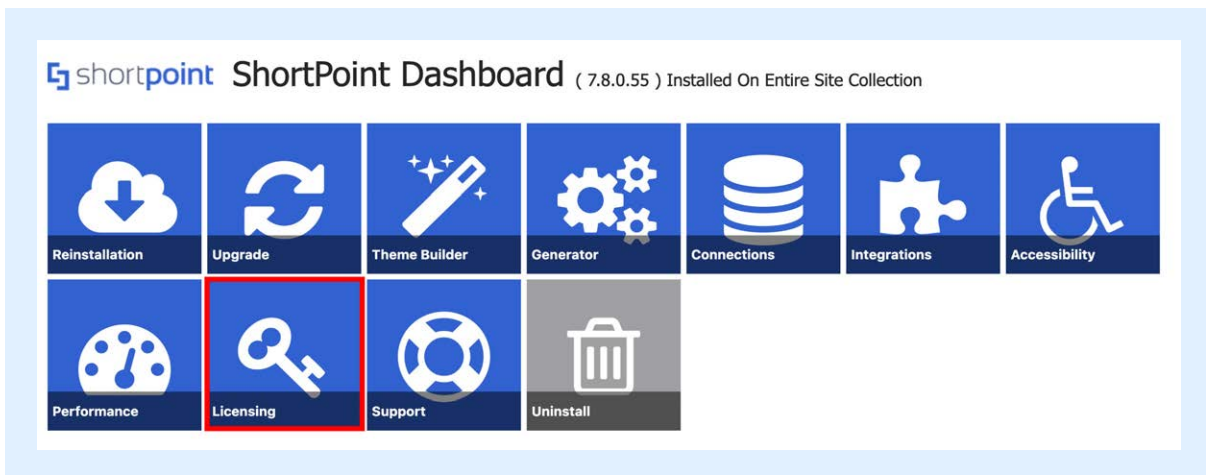


Figure 5.1.1 Licensing button in the ShortPoint Dashboard

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

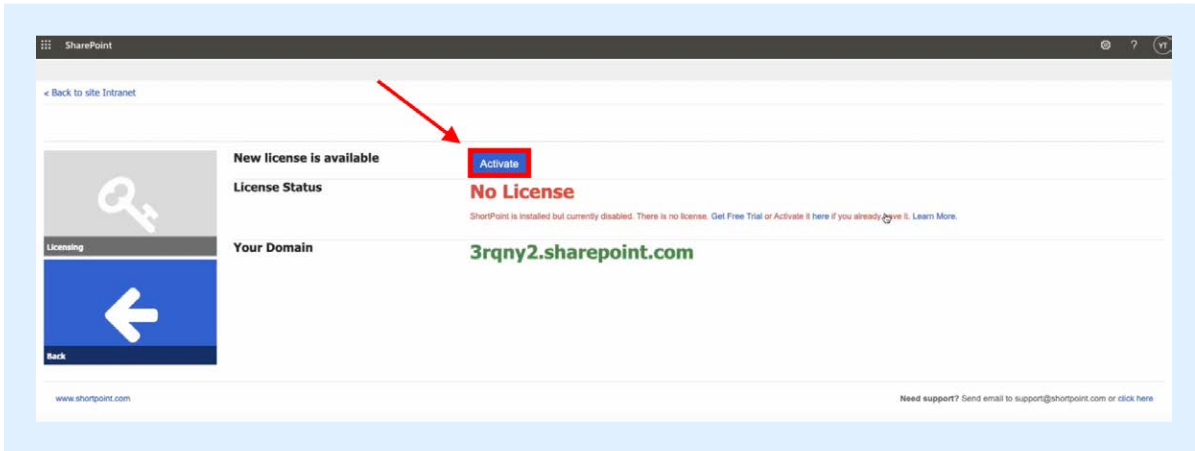


Figure 5.1.2 Activate button

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:

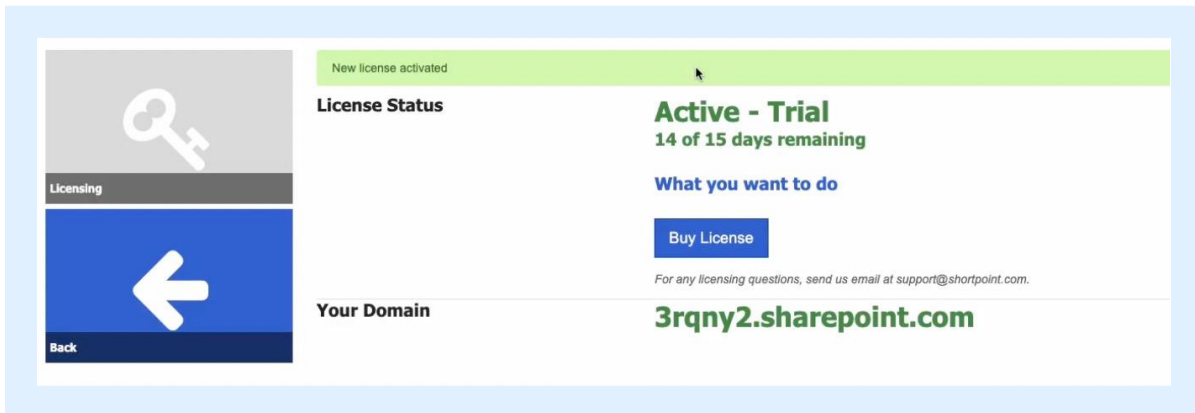


Figure 5.1.3 Active - Trial License Status

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:

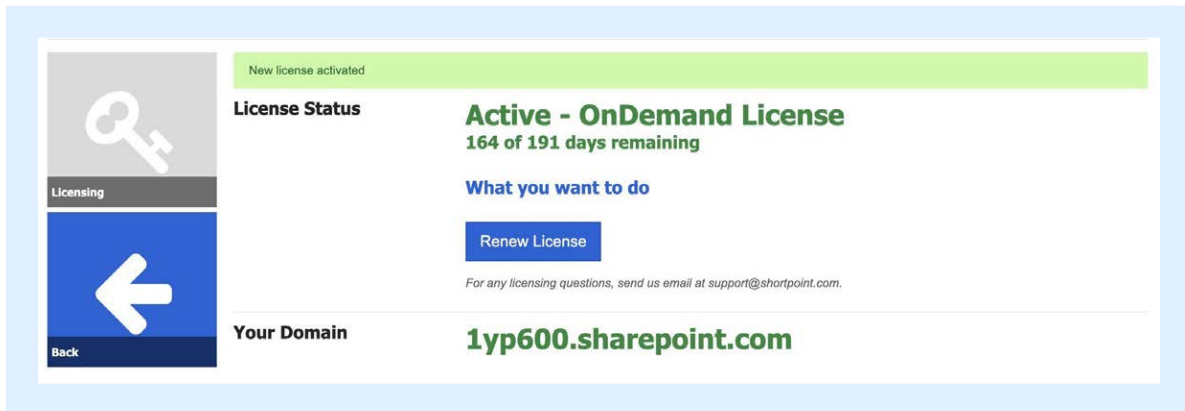


Figure 5.1.4 Active - OnDemand License Status

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**:

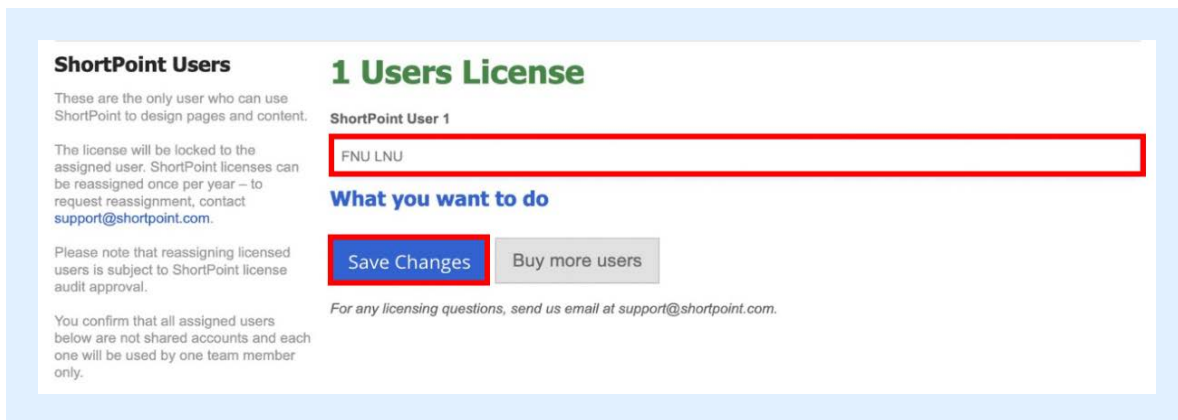


Figure 5.1.5 Assigning ShortPoint Users

NOTE: You may only change the ShortPoint 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 Microsoft 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.