

## A Member's Visual Guide to Using SharePoint Online

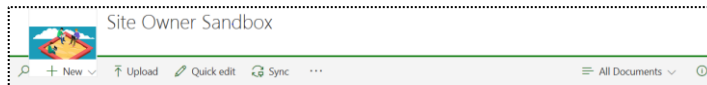
The information below details some of activities you'll do as a SP member (adding and editing documents and list items; viewing pages; etc). There's more than one way to do something; this document doesn't include all ways. Also, Microsoft will occasionally change the look, feel, and operation of the tool, making these tips obsolete or not quite correct. If you have problems with any of these functions, please contact your site owner(s).

**Quick Facts about SharePoint:**

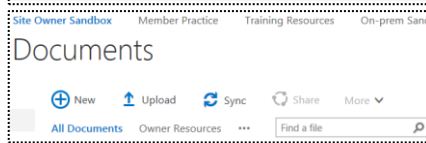
- Almost everything in SharePoint is a *list*, so everything works similarly.
- Address (URL) of an online SharePoint site will begin with: **https://allinahealth1com.sharepoint.com/sites**
- SP Online is mobile-friendly.
- A **free SharePoint app** is available for iOS (Apple) and Android mobile devices
- Features and functionalities are frequently added, removed, or revised, so this guide might be outdated or incorrect at times.
- Libraries in this platform can have two interfaces. Which one is used depends on the site owner.

**Document Library Interface:**

**Modern Experience:**

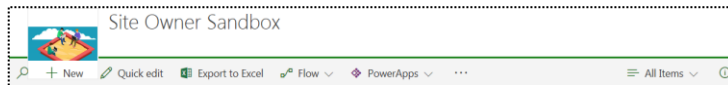


**Classic Experience:**

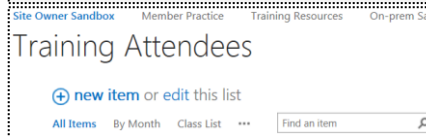


**List (Non-Calendar) Interface:**

**Modern Experience:**



**Classic Experience:**



**Contents:**

- [Logging In](#)
- [Navigating & Following the Site](#)
- [Document Libraries](#)
- [Lists](#)
- [Alerts](#)
- [Versions](#)
- [Calendars](#)
- [Links to Videos](#)

## Logging In

<http://login.microsoftonline.com>

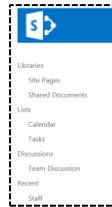
- **Allina Employees:**
  - On an Allina device:
    - SP user ID = **yournetworkID@allina.com**
    - Password = current **network password**
    - Note: If on a multi-user/shared workstation, be sure to sign out
  - On a non-Allina (personal) device:
    - Enter **yournetworkID@allina.com**
    - Select password text box
    - At next screen, enter **allinaw2k\yournetworkID** and your current **network password**
- **Non-Allina Users:** please consult [this document](#)

## Navigation

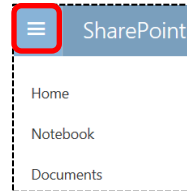
By the *Top link bar* →



By the *Quick Launch* →



If Quick Launch isn't visible (modern interface):



## Following a site:

This is another way (other than favorites/bookmarks) to quickly get to the site(s) where you are a member. When you log in on any device, the list you generated will be available.

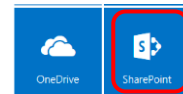
**NOTE:** this feature is NOT available to non-Allina users

Go to each site and select the FOLLOW icon

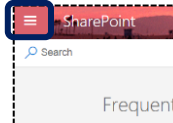
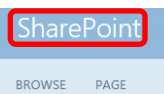


To **access the list** of sites you've followed:

1. Login if needed → Select the apps launcher ("waffle" icon)
2. Select SharePoint tile or the SharePoint link in upper left screen
3. If followed sites list doesn't show, select the "hamburger" icon



or



To **stop following a site:**

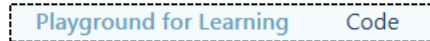
Select the white star at the top of the site's tile (The star's color changes to black when hovering over it; click on it and site is removed from your list)



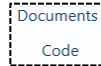
**Finding a view (in this example, Code):**

Views are useful ways to show items or documents in a list or library that the site owner has created to facilitate retrievability. Each list or library can have multiple views, each with its own sorting, filtering, and grouping.

In the *Top link bar* →



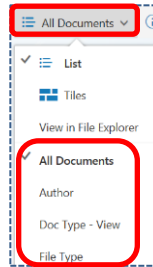
In the *Quick Launch* →



In a classic user interface →  
[click ellipsis to see all available views]



In a modern user interface →

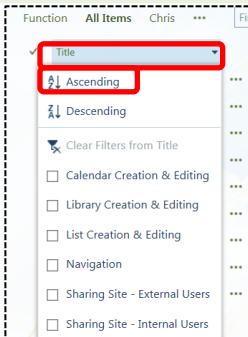


**Finding an item or file by sorting/filtering a list or library column:**

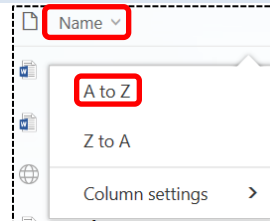
**Sorting** (for example, alphabetizing A to Z items/documents):

**Filtering** (for example, finding only certain items/files; can choose more than one column to filter on)

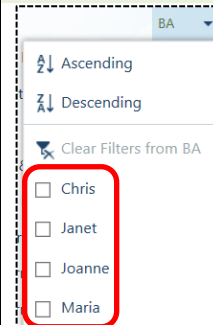
Classic interface:



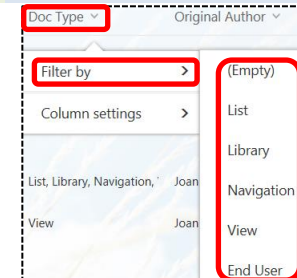
Modern interface:



Classic interface:

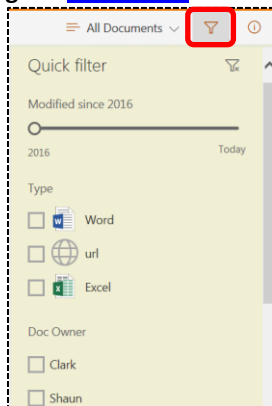


Modern interface:



Video: [classic interface](#)

**Using the Quick filter in a modern list/library interface:**



## Document Libraries

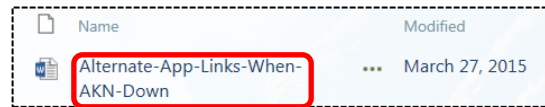
SP uses color codes to assist the user; color codes for principal file types:

- **Blue** for Word
- **Green** for Excel
- **Orange** for PowerPoint

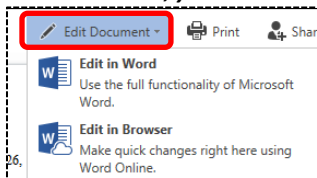
There is no top link bar in the modern library or list interface. Instead, there is a *command bar*. Available choices vary, depending on activity.

### Read or edit a file in browser

Click file name's hyperlink:



Once open in the browser, you can choose to **edit** the document:

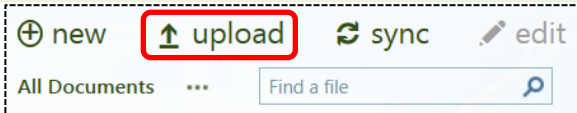


For more on editing a file, go to page 5.

Video: [classic interface](#)

### Add (upload) a new file from your computer:

**Classic interface:**

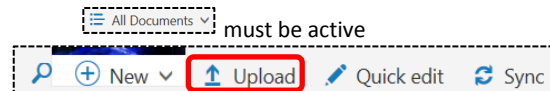


Complete the pop-up form that appears →  
**Check In**

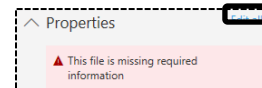
Video: [classic interface](#)

**Modern interface:**

Make sure no document is selected



If data is required in a column, a pane on the right will open. Select **Edit all**

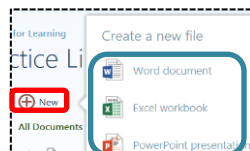


If data is not required in any column, find the new document → [fill in its properties](#) (p. 6)

### Create a new file online:

**Classic interface:**

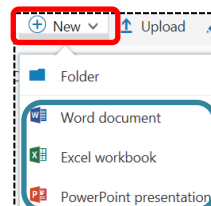
1. Select **New**
2. Select **file type**



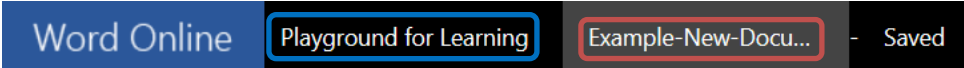
**Modern interface:**

Make sure no document is selected

**All Documents** should be active



3. Once new file is open, **rename** (generic title is in middle of black bar at top of screen) according to the site's naming convention.

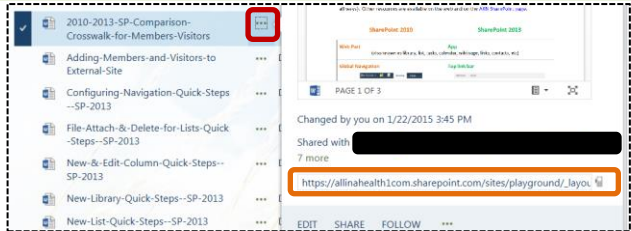


4. Click **site name** to return to library
5. Find the new document → [fill in its properties](#) (p. 6)

**Obtain a link to a file to include in an email**

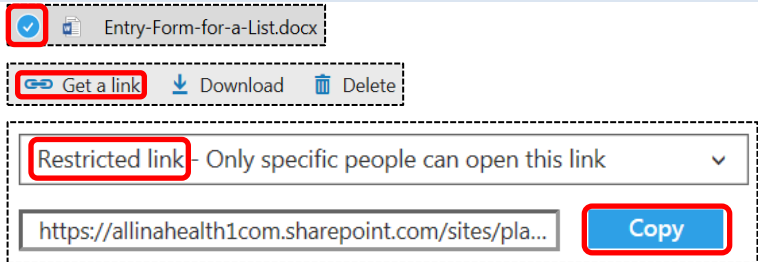
**Classic interface:**

1. Click **ellipsis** to right of file name/title
2. Click **inside the text box** to highlight the address
3. **Copy and paste** in email message



**Modern interface:**

1. Select the **file**
2. Select **Get a link**
3. Choose **Restricted link** → **Copy** → **Paste** in email message



**Editing Files & More**

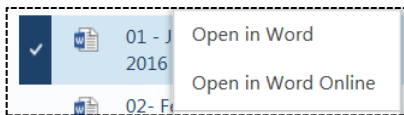
Files (Word, Excel, etc) may be edited online or by using the computer’s software. Online program functionality is limited, so this option is best used for quick, simple edits. You may need to manually save the edits. Files edited on the computer’s software must be saved manually (click the *Save* icon). Editing a file that has been checked out can be done online or on the computer.

**Open a file for editing** (Word file in this example):

1. **Right-click** file hyperlink

**Classic interface:**

2. Select to open in the computer’s program or the online version



**Modern interface:**

1. Select **Open** → select computer’s program or the online version



3. If editing in the computer’s program, click  to save to the SharePoint document library.

**Video:** [classic interface](#)

**Download or check out a file:**

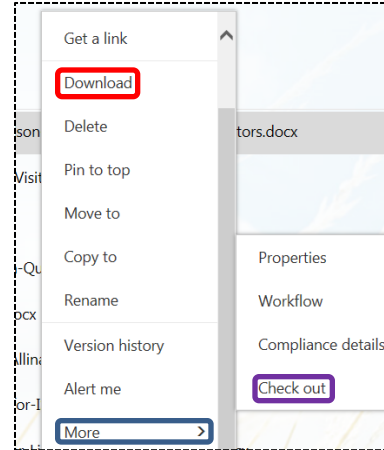
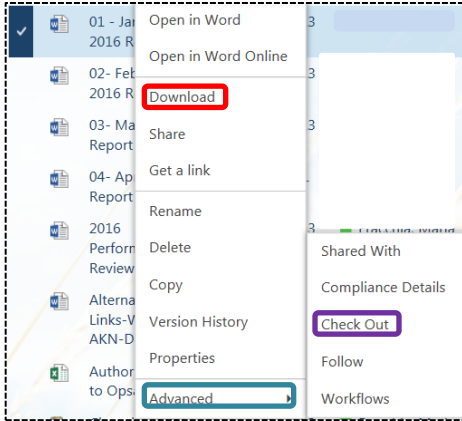
(The *Check Out* option will appear only if the site owner has enabled it. Not all options seen here may show in your view.)

**Classic interface:**

1. **Right-click** file hyperlink
2. Select **Download** or **Advanced** → **Check Out**

**Modern interface:**

1. **Right-click** file hyperlink
2. Select **Download** or **More** → **Check out**



For both interfaces,  indicates file is checked out

**Check in a file:**

When you save a file after checking it out, you can check it in at that time. If you wait to check in from the library view, follow the above and select *Check In* (*Check Out* will not be an option).

**Note:** Site owners may undo or *Discard Check Out*

**Delete a file:**

**Classic interface:**

1. **Right-click** file hyperlink
2. Select **Delete** → **OK**

**Modern interface:**

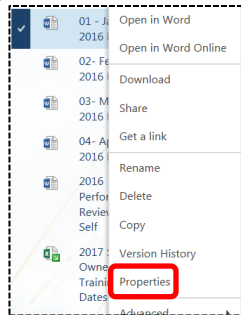
1. **Right-click** file hyperlink
2. Select **Delete** → **Delete**

Video: [classic interface](#)

**Edit or add the *properties* (metadata) of a file:** (Refer to illustrations for *Download or check out a file*)

**Classic interface:**

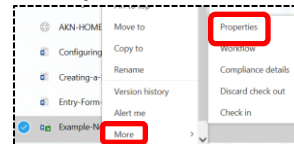
1. **Right-click** file hyperlink
2. Select **Properties**



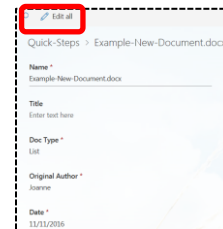
3. Make changes → **Save** button
4. [Check in](#) (p. 5) the file if needed

**Modern interface:**

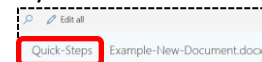
1. **Right-click** file hyperlink
2. **More** → **Properties**



3. Select **Edit all**



4. Fill out each field, clicking outside the new entry to auto-save it
5. Select library title in breadcrumb

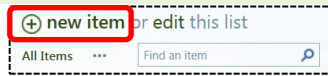


6. [Check in](#) (p. 5) the file if needed

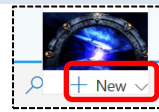
## Lists

### Create a new item in a list:

#### Classic interface:

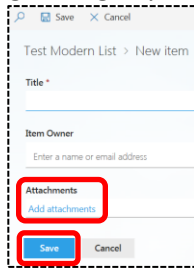


#### Modern interface:



#### Both interfaces:

Fill in fields, including adding any attachments → **Save**

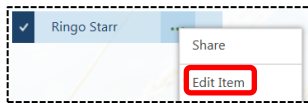


Video: [classic interface](#)

### Edit a list item:

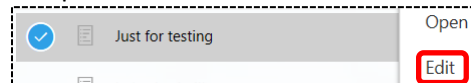
#### Classic interface:

Select ellipsis next to item link → **Edit Item**



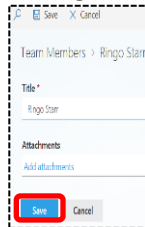
#### Modern interface:

Select ellipsis next to item link → **Edit**



#### Both interfaces:

Make any changes, including adding or deleting attachments → **Save**



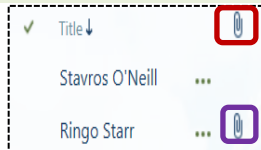
Video: [classic interface](#)

### View an item and an attached file:

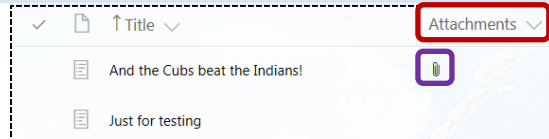
Read the item on screen as is **or** select item's link (open the item)

One or more files may be attached to any list item. If there is an **attachment column**, a **paperclip** will appear in the item's entry/row. If there is no attachment column, open the item to see if there is one.

#### Classic interface:

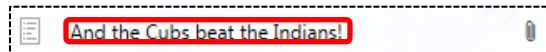


#### Modern interface:



#### To open and read an attachment in either interface:

1. **Open/select** the item
2. Select **attachment's link** (in this example, there are two attachments)



3. Select **Open** (will download to your computer)



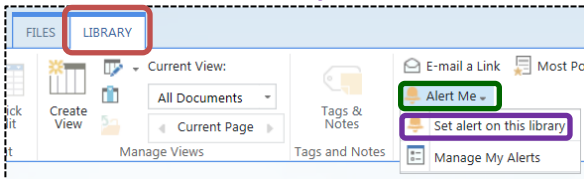
## Alerts

### Set an alert on an entire list or library:

1. Navigate to the desired list or library

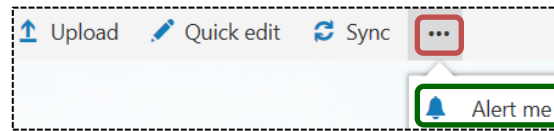
#### Classic interface:

2. Select **List/Library** tab → **Alert Me** → **Set alert on this list/library**



#### Modern interface:

2. In command bar, select **ellipsis** → **Alert me**



#### Both interfaces:

3. Complete the form → **OK**. You should receive an email notification within a few minutes that the alert was created.

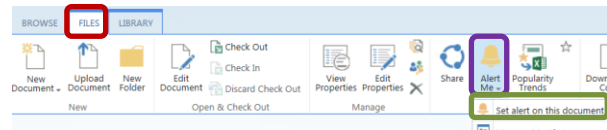
Video: [classic interface](#)

### Set an alert on a *single* file or item:

1. Navigate to the desired list or library → click **checkbox to left** of file/item hyperlink

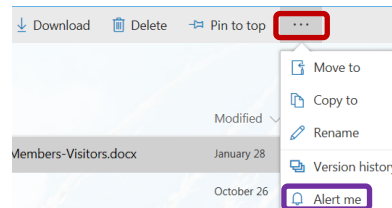
#### Classic interface:

2. Select **FILES** → **Alert Me** → **Set alert on this document** ( or item if in a list)



#### Modern interface:

2. Select **ellipsis** in command bar → **Alert me** (in the *Alert Title* box will be the name of the library/list and the name of the file/item)



#### Both interfaces:

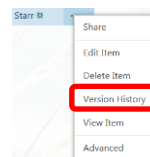
3. Complete the form → **OK**. You should receive an email notification within a few minutes that the alert was created.

## Versions

### View, restore, or delete earlier versions:

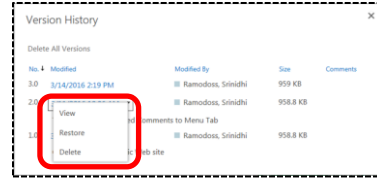
Versioning, available in both lists and libraries, must be active for *Version History* to show as a choice. Depending on your permissions, some choices may not appear.

1. Navigate to the desired list or library
2. Select **ellipsis** to right of item/file → **Version History**





3. Hover over link of desired version to activate drop-down menu
4. Choose desired action (View; Restore; Delete) → **OK**

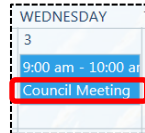


Video: [classic interface](#)

## Calendars

View an event in a calendar (type of list):

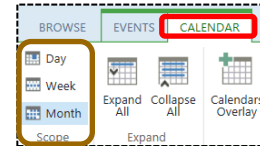
Select title/name of event



Video: [both interfaces](#)

Change the calendar view:

When you're in the calendar, select **CALENDAR** then the **view** you want












Add a SharePoint calendar to an Outlook account:

1. Navigate to calendar in SharePoint → select **CALENDAR** tab
2. In *Connect & Export* section in ribbon, select **Connect to Outlook**
3. Select **Allow** in dialog box → select **Yes** in next box
4. In Outlook – Calendar, open **Other Calendars** → select the box next to the calendar name

Changing or creating events etc. to the SharePoint calendar can occur either in SharePoint or in the SP calendar within Outlook. However, your Outlook calendar cannot be connected to SharePoint and any changes to that will only show in Outlook.

## Links to videos

Classic interface:

-  [Add documents to a document library](#)
-  [Renaming, deleting, and restoring files within a library](#)
-  [Viewing and editing files in a library](#)
-  [Add items to a list](#)
-  [Edit or delete items in a list](#)
-  [Find information in a list or library with sorting, filtering, and views](#)
-  [Set up an alert for a list](#)
-  [Create a personal view of a list or library](#)
-  [Add an event to a calendar](#)