“How Do I?” – A SharePoint Online Tip Sheet

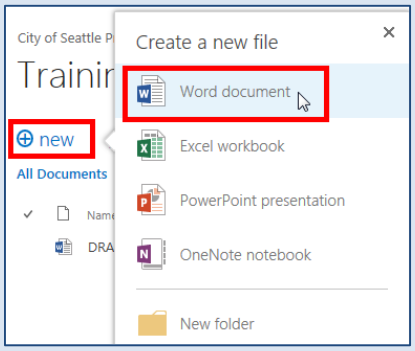
New to SharePoint Online? This document gives the answers to common “How Do I?” questions when first using SharePoint Online

Office 365 – SharePoint Online Tip Sheet

How Do I Open a New Word Document in SharePoint Online:

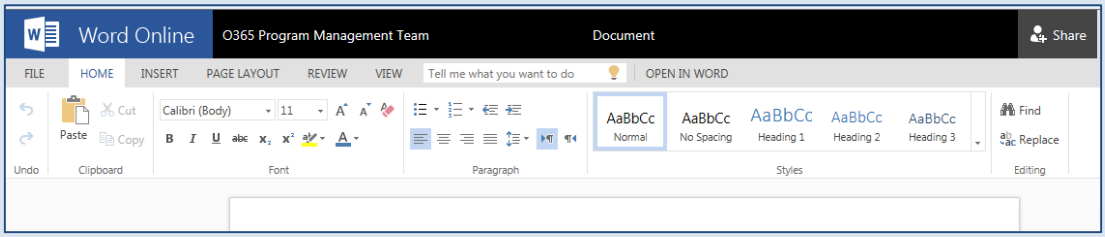
There are a couple ways to start a new document from SPO:

1) Using the Toolbar
   Go to your **SharePoint Online Team Site** and click the folder where you want to save the new document.



Click the **New Button at the top of the library** and select the type of file you want to create. In this case, a Word document

A new document will open in Word Online.

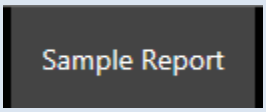


2) Using the Ribbon to create a new Word document
   Click on the File Tab. Select New Document. A new document will open in the Word installed application

How Do I Name the New Document in Office Online?

In the header section of the Office Online document you can see the title of the document. To change the name directly, just click on the current name.

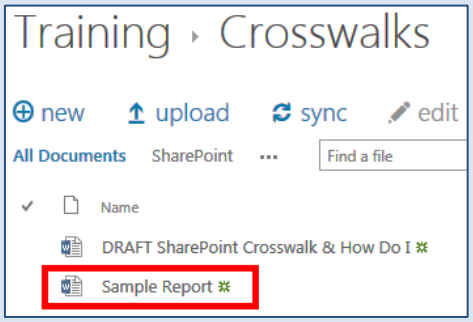
Then type the name of the File –easy as that!



How Do I Save the New Document?

Office Online saves the document automatically in the Cloud. When finished with your document, click the back arrow at the top left of the monitor.

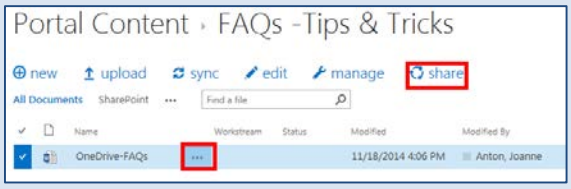
The new document is saved in the folder.
The Green insignia next to the name indicates the document is new.

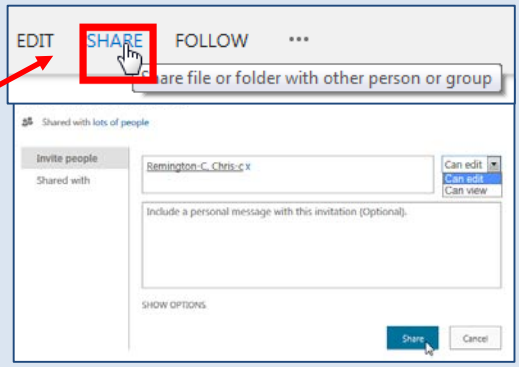


Office 365 – SharePoint Online Tip Sheet

How Do I Share A Document?

From the OneDrive browser interface, click the document name to select. Click either the **Ellipsis** or the **Share** link.





If you click the **Ellipsis**, click **Share** at the bottom of the window.

Enter name(s) of people to Share. **Choose Edit orView** and include a note. Click Share.

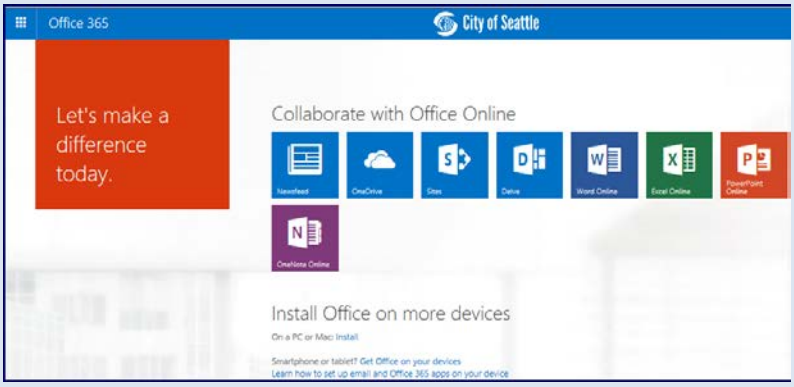
The recipient will get an email with a link to the document.

I'm Confused By This Page – Am I Suppose to Install Something? I'm Told Employees Can't. Please Explain!

This is part of the main office 365 Landing Page. No – employees aren't suppose to install any applications on City computers.

IT staff will always do this for you.

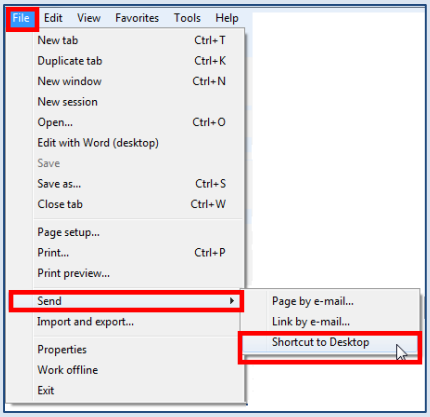
This page the the main "gateway" to Office 365 and the Online versions of the familiar Office applications the City has used for years.



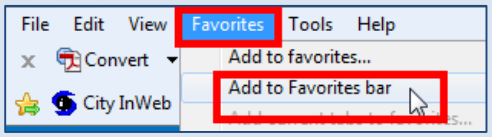
What's the Fastest Way to Open My SharePoint Online Site?

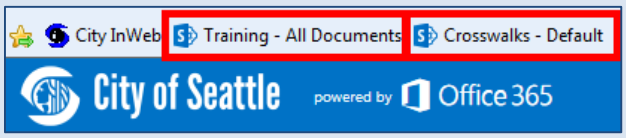
Here are some easy and efficient ways to get to your site:

1. **Create a Shortcut on your desktop.** While at your site, click the File Menu, scroll to send and select **Shortcut to Desktop**. The Shortcut will be placed on the Desktop.



2. **Add as a Favorite to the Favorites Bar.** Will look like this. The example shows two Favorites. One is the main folder Training folder and the second is a subfolder.





Office 365 – SharePoint Online Tip Sheet

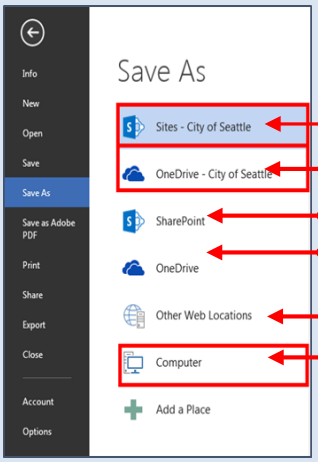
I Want to do a Save As for a Document I started in Office 2013 to save in the Cloud but I'm confused by the Save As Screen. How Do I Know what to pick?

You're right. When you click the File Tab in Word or Excel 2013, you'll see more Save As options.

You have more locations to save your documents, depending on if you store your work locally on your Home or Shared Drive or store your work in the Cloud in OneDrive for Business or SharePoint Online.

Save documents in ONLY THREE MAIN PLACES as noted in the Red Boxes below:

1. **SITES – CITY OF SEATTLE: This is the City's SharePoint Online site and where SharePoint Online Team sites are located**
2. **ONEDRIVE - CITY OF SEATTLE: This is your secure storage area for City documents – think of it like a Home Drive in the Cloud that only you can access**
3. **COMPUTER: This is saving to your network Home or Shared Drive**



Below is a quick explanation of the different options:

Sites – City of Seattle: Opens a list of your SharePoint Online Team Sites.

OneDrive – City of Seattle: Opens the directory to **your** City-assigned Personal Cloud Storage.

SharePoint: Opens a list of SharePoint 2010 sites you have accessed.

OneDrive: Goes to the consumer version of OneDrive available to general public. **Do not store City business here.** Requires a Microsoft login. City credentials will not work.

Other Web Locations: A list of recently opened internal web pages.

Computer: Opens the window with your local PC, network home or shared Drives.

It Feels Strange Not To Enter A Password At Login. Is this Secure?

Yes – very secure. It's all part of an integrated system. Office 365 checks your email address and if you are logged in at the City, it knows to let you through to access your data.

When trying to log in from home or another non-City location, after entering your email address, another screen that requires your password will be presented.

What is "sync" and How Do I Benefit from Syncing?

Sync is the process where the contents of a **SharePoint or OneDrive Document Library** is copied to a computer and updated back and forth between the local drive and Cloud. This allows you to work on synced documents even if you aren't connected to a network.

Why Sync? So when you are offline, you'll have the ability to edit document in the Cloud.

Note: Users should <u>not</u> sync City materials to any non-City-owned device to protect you and your non-City-owned device from public disclosure.

When should I use Sync?

Sync is useful for your OneDrive to be sure you can manage your own documents on your City computer in case of a network outage, or if you are taking a laptop outside the office to do work.

Although, SharePoint Online document Libraries can be synced in the same way, more discretion is advised. Only sync a SharePoint directory if you have immediate plans to be working offline with that directory.