

SHAREPOINT USER GUIDE

updated Jan. 2019





Microsoft SharePoint Online is a cloud-based service that helps organizations share and collaborate with colleagues, partners, and clients. With SharePoint, you can access internal sites, documents, and other information from anywhere—at the office, at home, or from a mobile device.

Files that are uploaded to the GRI team SharePoint site are accessible by everyone at GRI. Word, Excel, and PowerPoint files can be edited by multiple authors simultaneously. (Similar to Google Docs.)

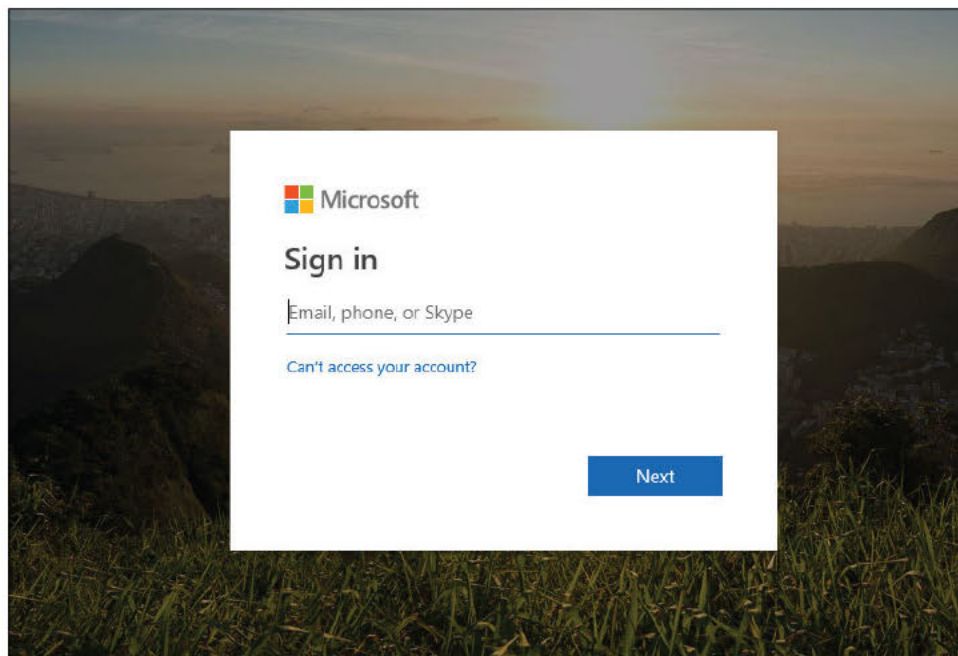
While you can access these files from any browser on any computer, it is advised that you edit files on a device that has Office365 desktop applications installed.

ACCESSING SHAREPOINT

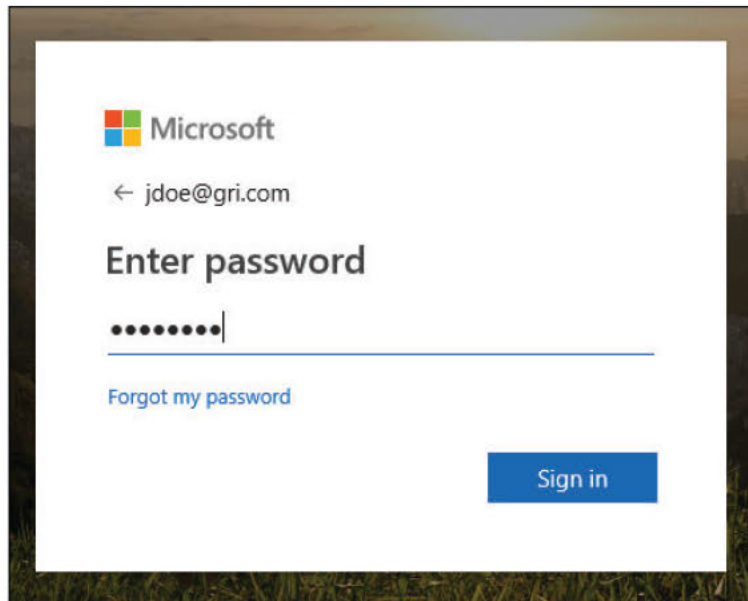
Access the GRI SharePoint site here:



You will be prompted to log in to your Microsoft Office365 account.

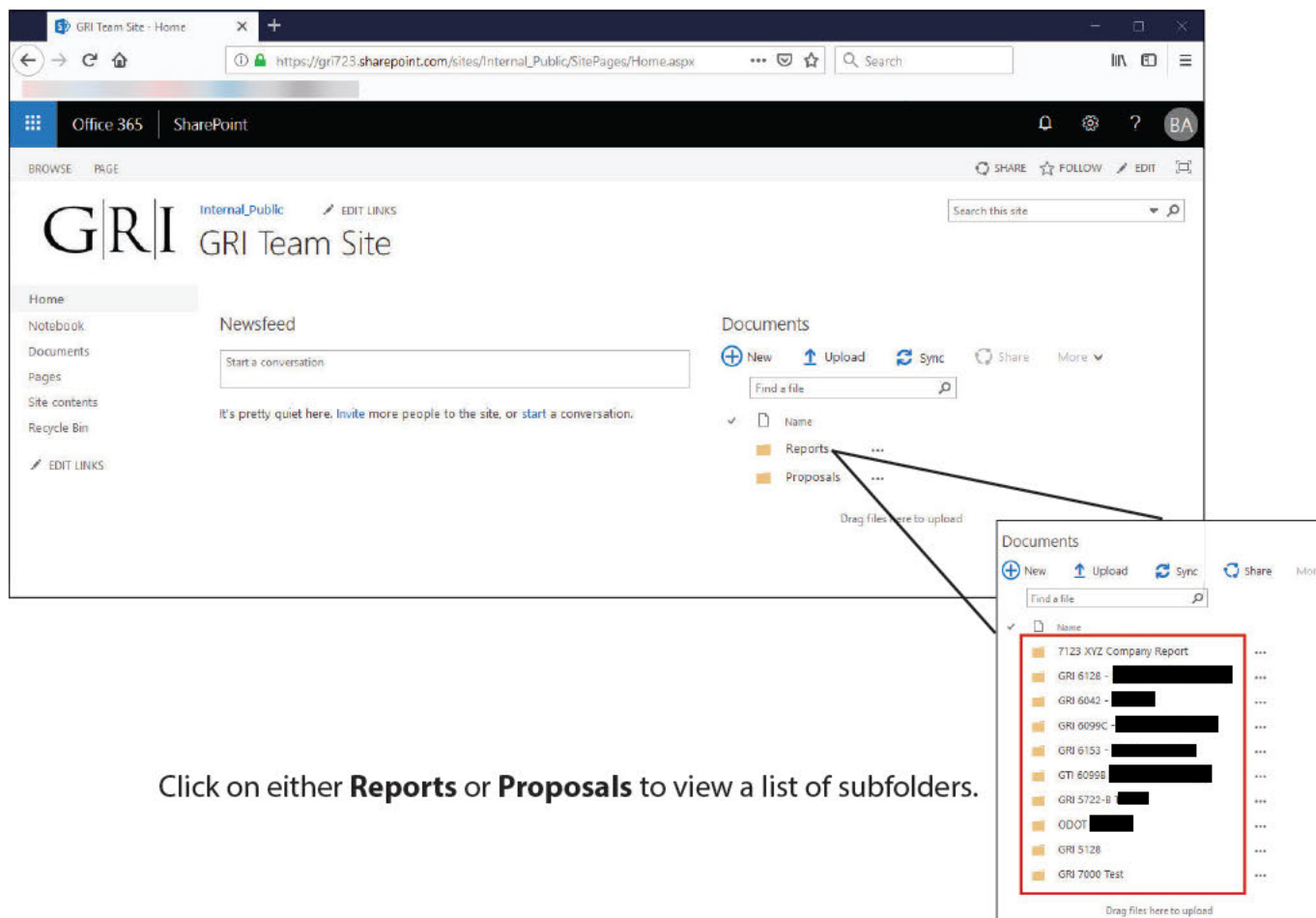


Enter your GRI email address and click **Next**.

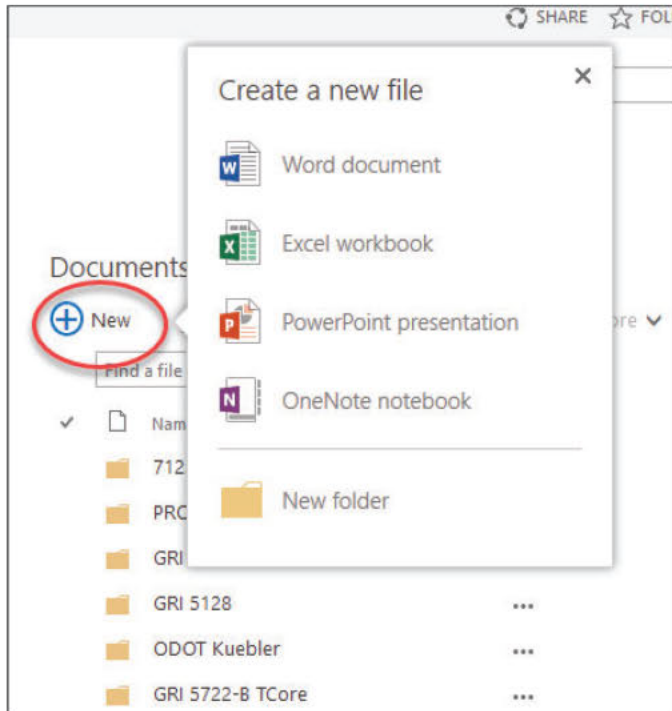


Enter the password associated with your Office365 account. Click **Sign in**.

You will be directed to the home page for the GRI Team Site. The **Documents** column on the right contains all of the folders and files that have been uploaded by users to the GRI Team Site.

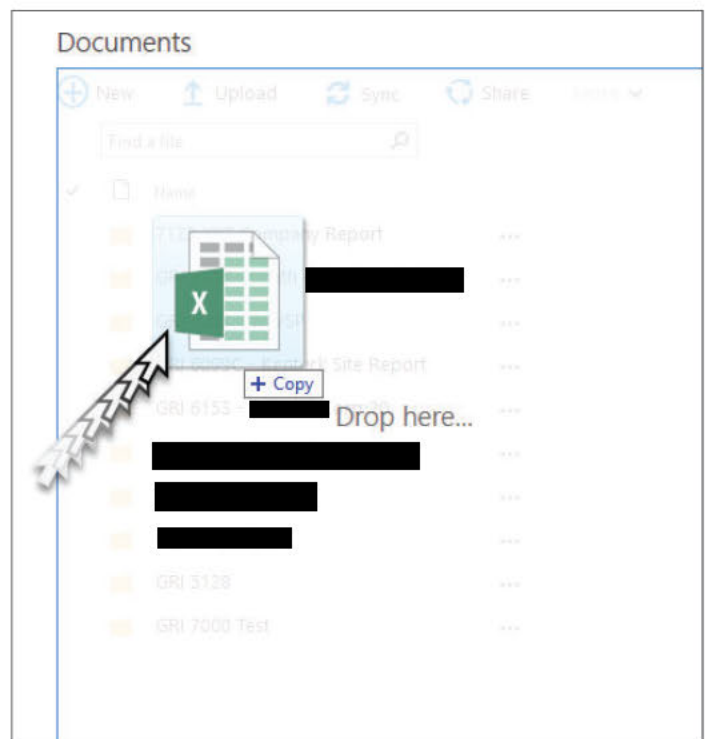
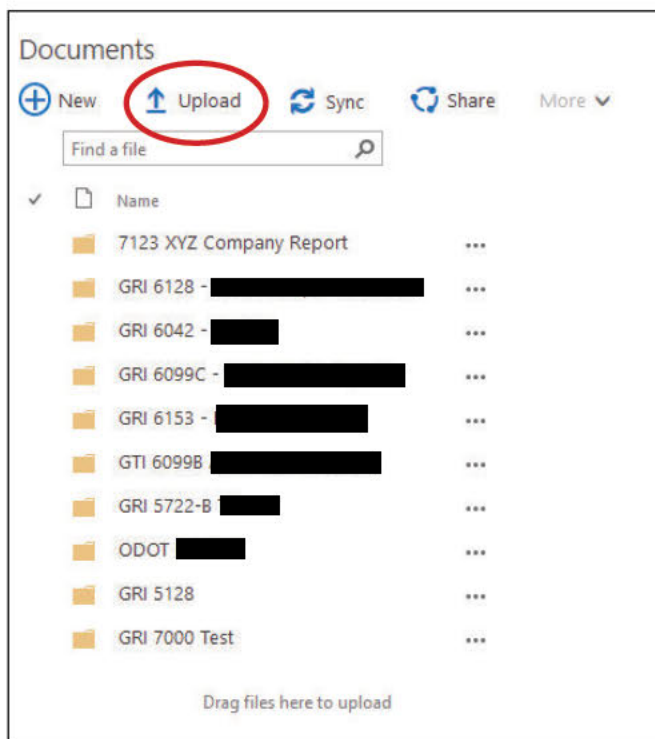


CREATING FOLDERS AND FILES

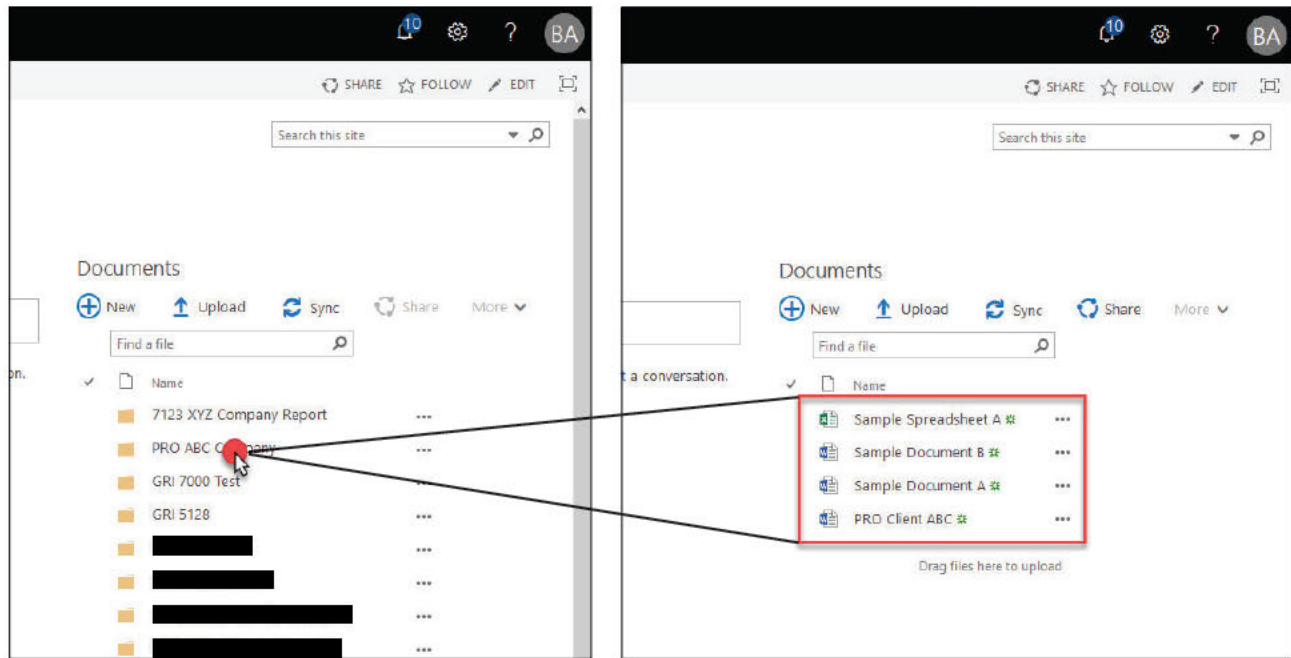


You can create a new folder or file by clicking **New**. Select the type of file you would like to create, or choose **New folder**.

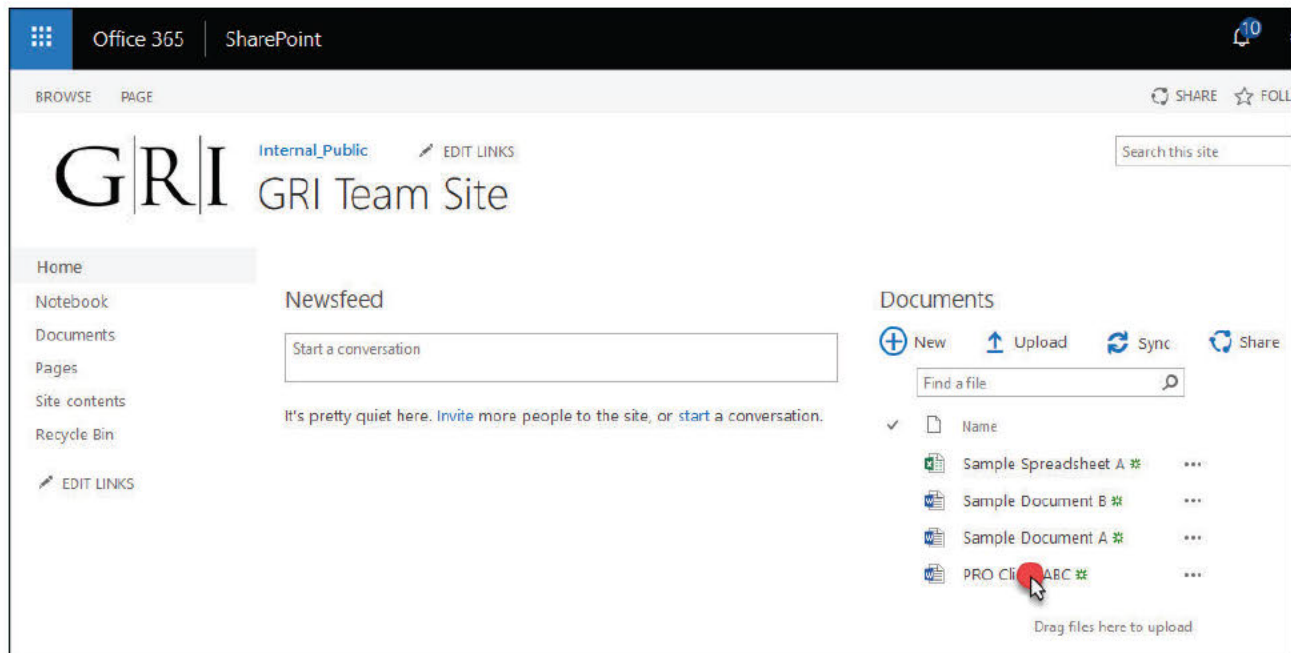
You can also add existing files from your computer by either clicking **Upload**, or by dragging and dropping a file from your computer to the Documents area. Note that you cannot drag and drop a folder from your computer. Folders must be created by clicking **New > New Folder**.



ACCESSING FILES



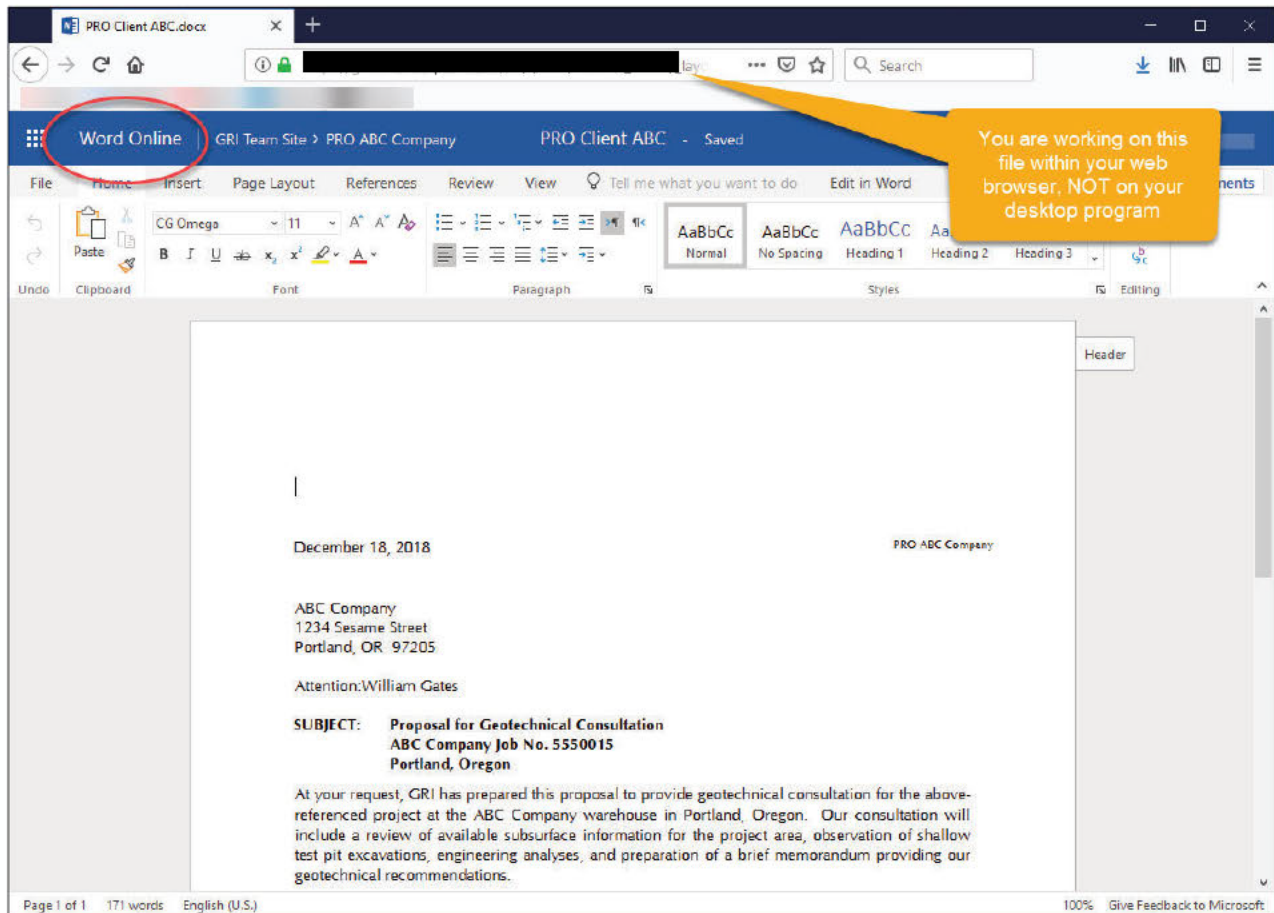
Clicking on a folder will display a list of all the files within that folder.

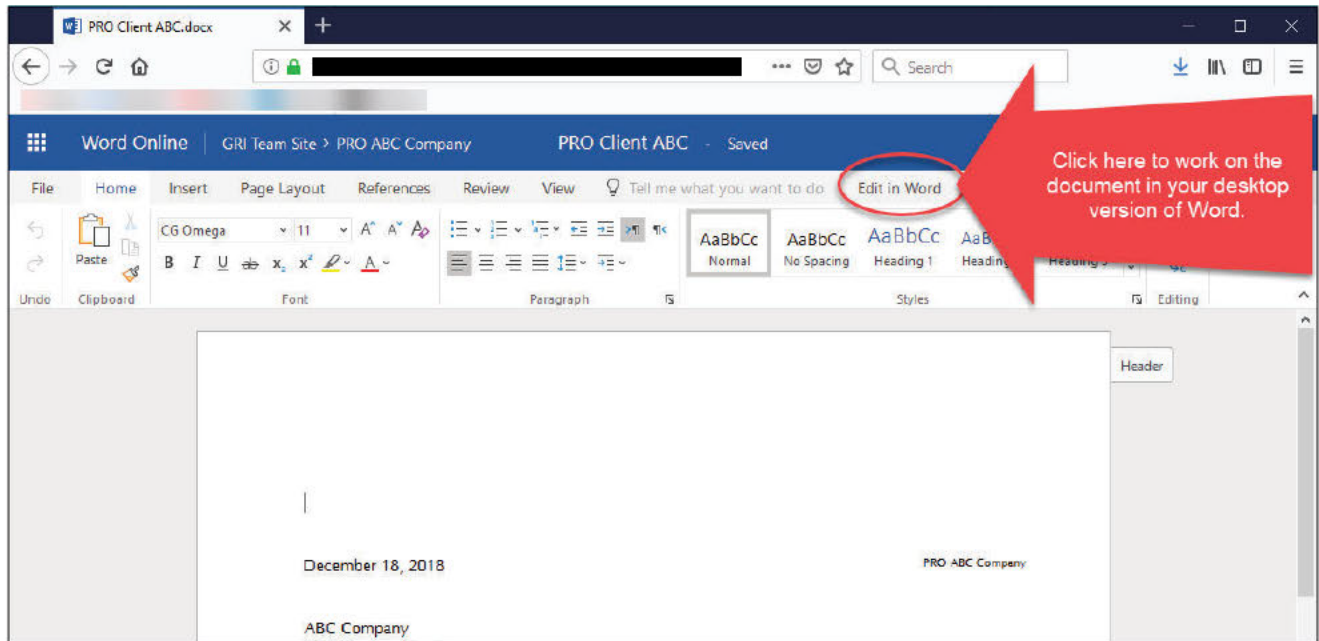


Click on a file to open it.

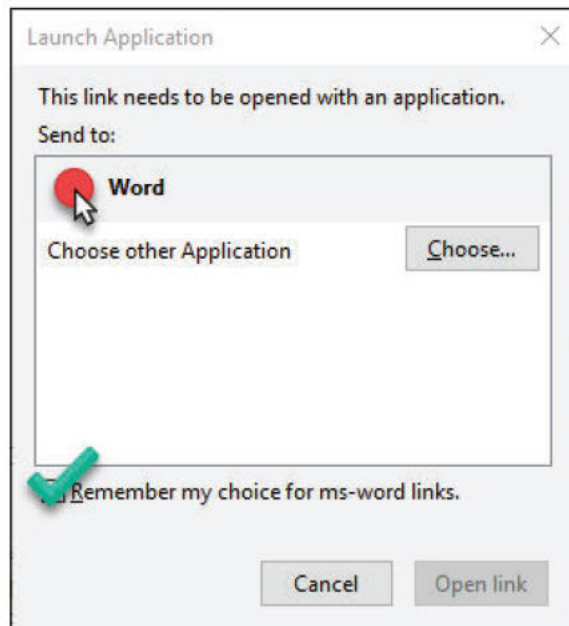
EDITING FILES

Files in SharePoint will initially open in Word Online within your web browser. Word Online lets you make basic edits and formatting changes to your document in a web browser; however, many features (including Track Changes) are disabled or work differently in Word Online. It is strongly advised that you do not edit files using Word Online. The best practice is to use Word Online's **Edit in Word** command.



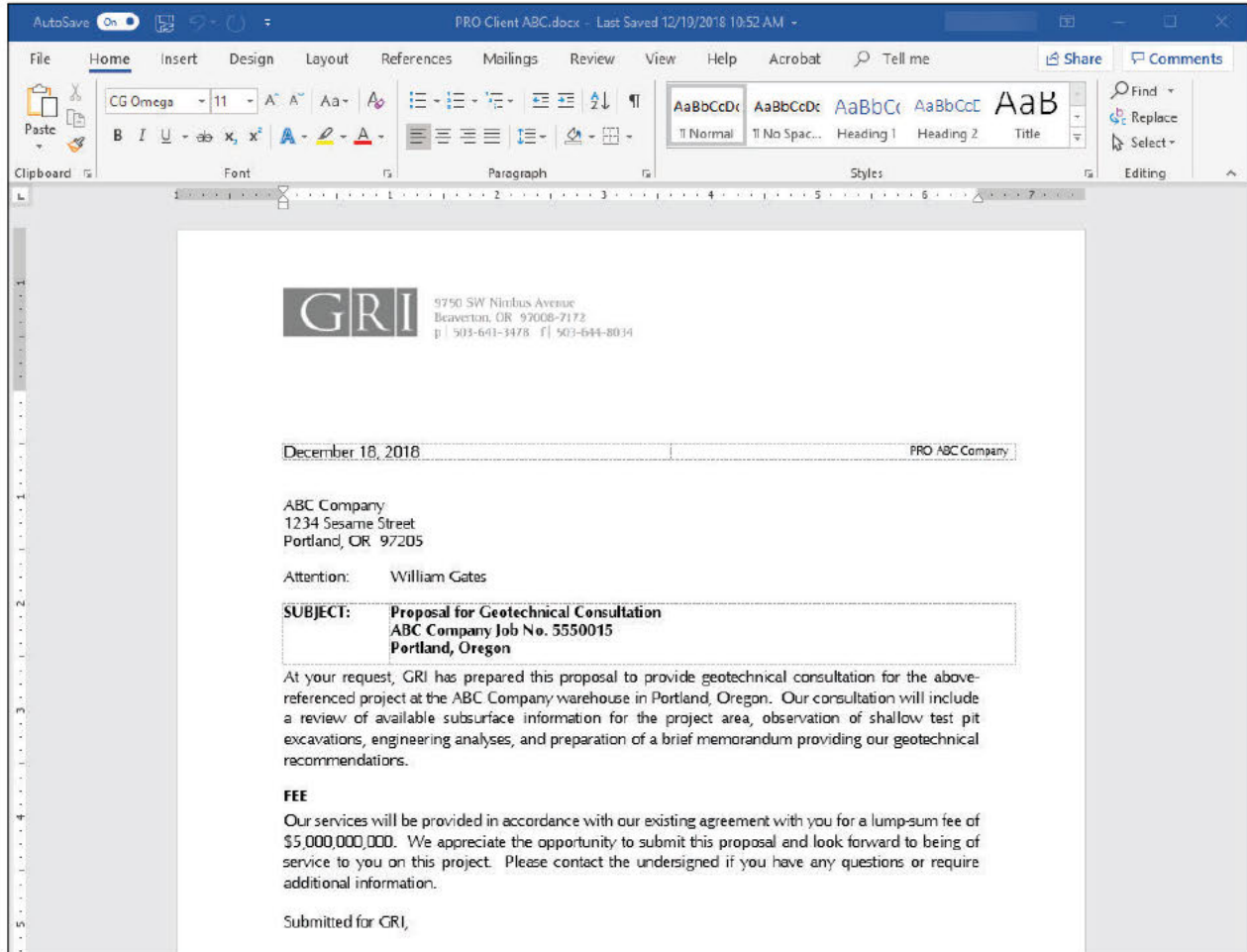


Click **Edit in Word** to open the file in your desktop version of Word.



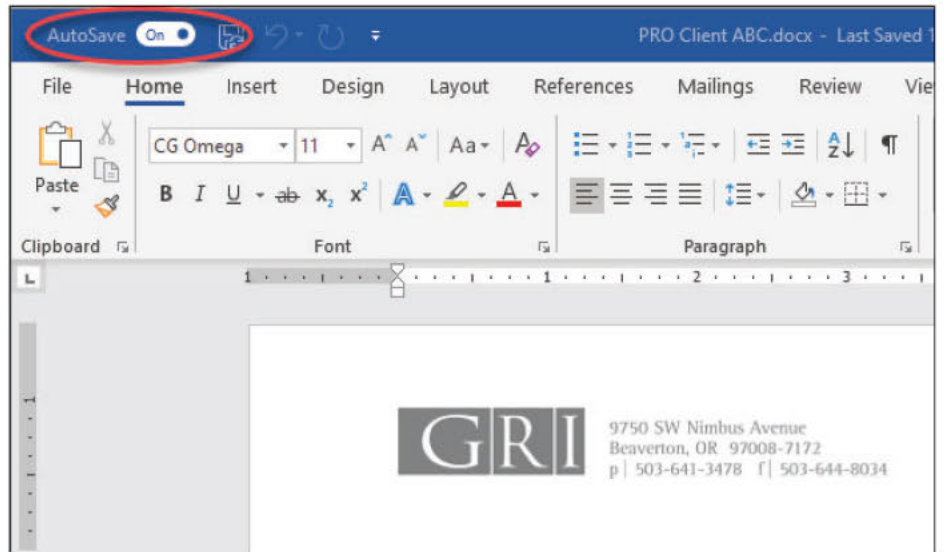
You may see a popup that asks which application to use to open the file. Click on **Word**, then click **Open link**. You may also wish to check **Remember my choice for ms-word links** to avoid seeing the popup each time you open a file.

You can now edit the document using the full functionality of your desktop Word application.

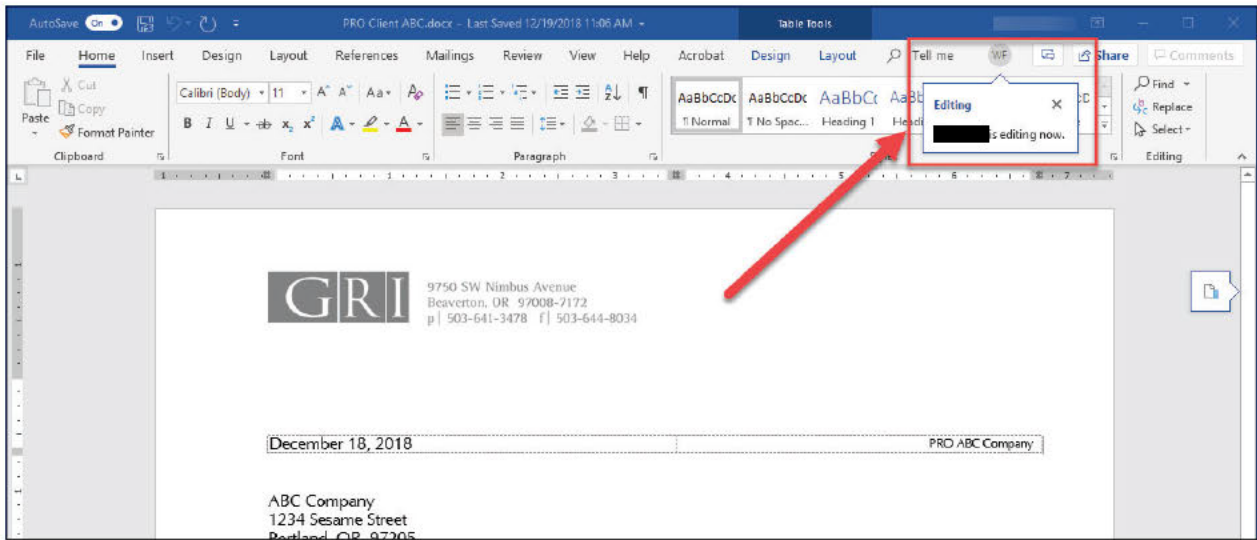


Note that the AutoSave function is enabled. Any changes or edits that you make to the document will be automatically saved. AutoSave ensures that the most current version of the document is saved on the GRI SharePoint site.

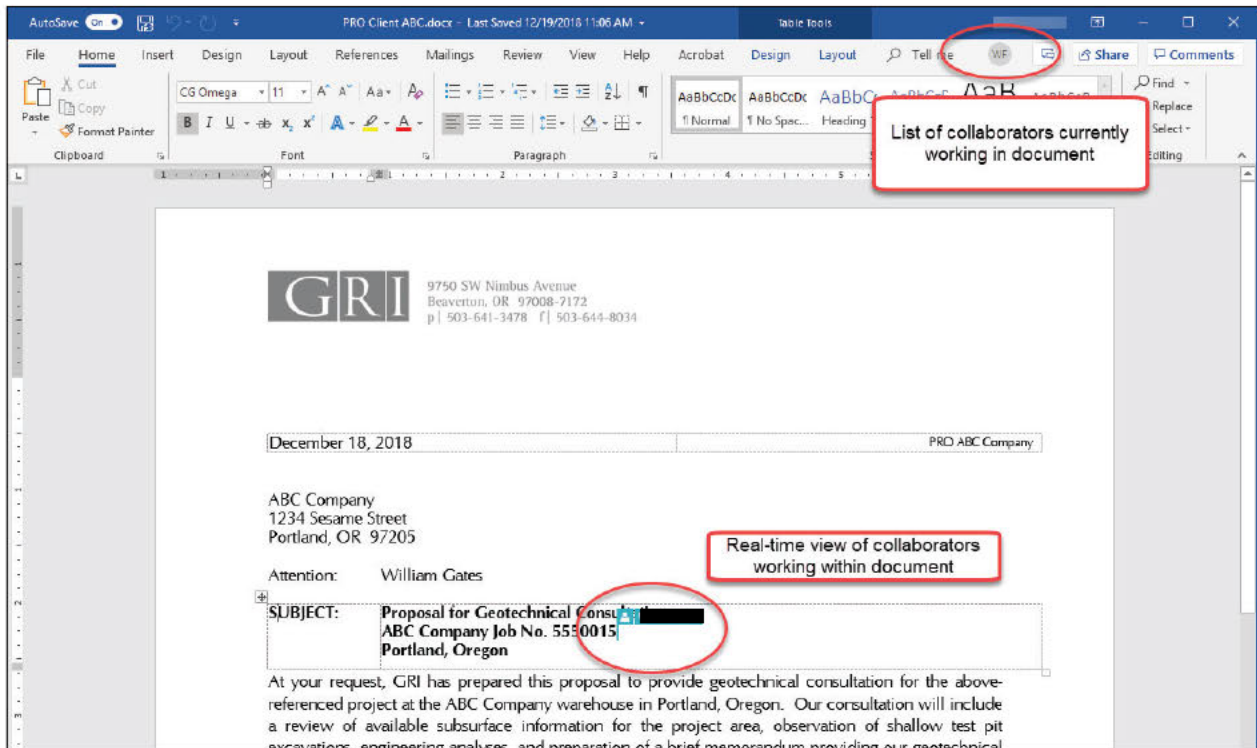
Do not save a copy of the document to your desktop or to a project folder.



COLLABORATION



It is possible for multiple people to edit a document at the same time. You will see a popup at the top of the window in Word if someone else is currently working within the document.

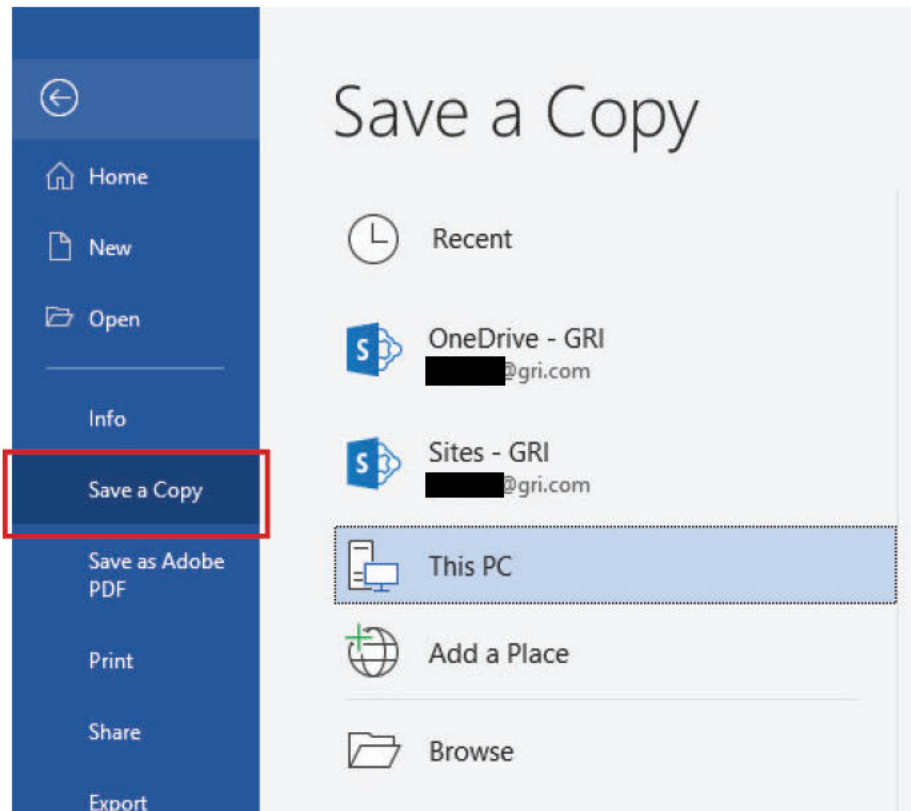


You will see a colored cursor for each collaborator working on the document.

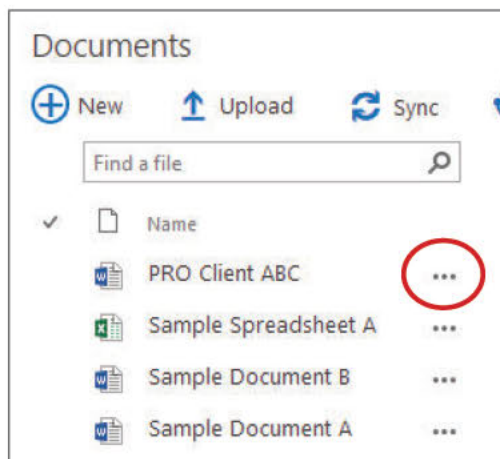
REMOVING FILES

SharePoint is not meant to serve as permanent file storage. Folders and files should be moved to locations on the GRI server once you no longer need the functionality of SharePoint.

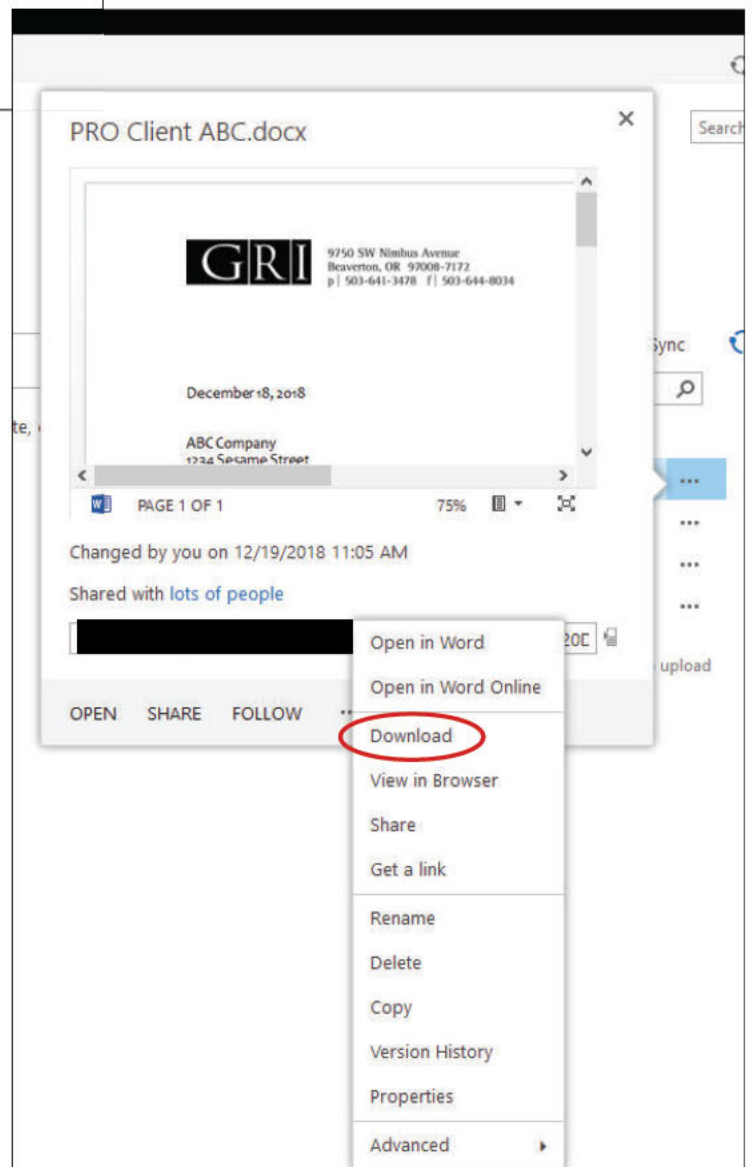
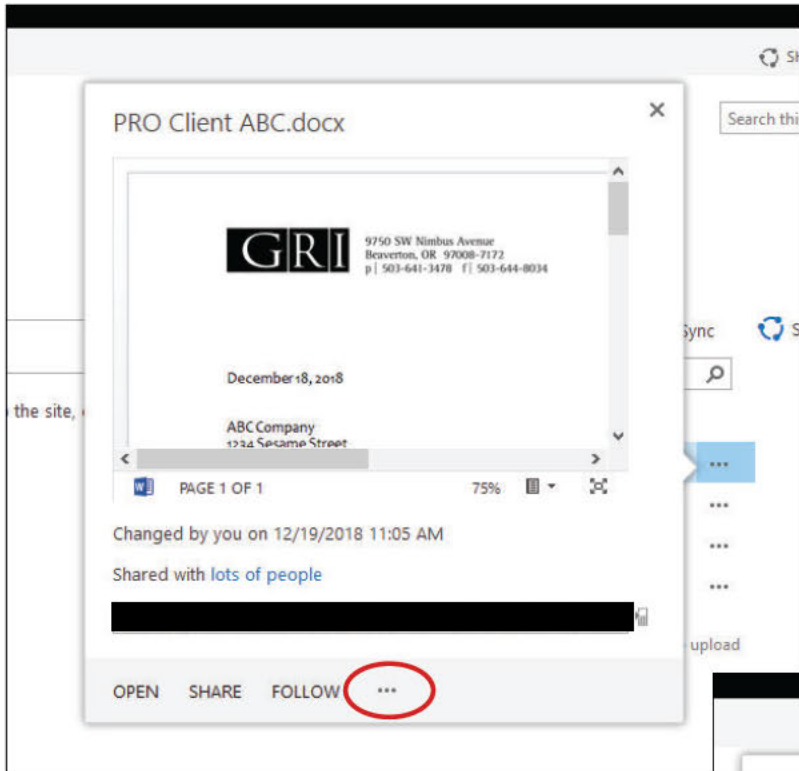
There are two ways to move files from SharePoint back to the GRI server. First, you can open the file using Edit in Word (see above), then use **Save a Copy** to save a copy of the file to the appropriate location in the Projects/Proposals folder.



You can also choose to download files from SharePoint by clicking on the ellipses (...) to the right of the file name.

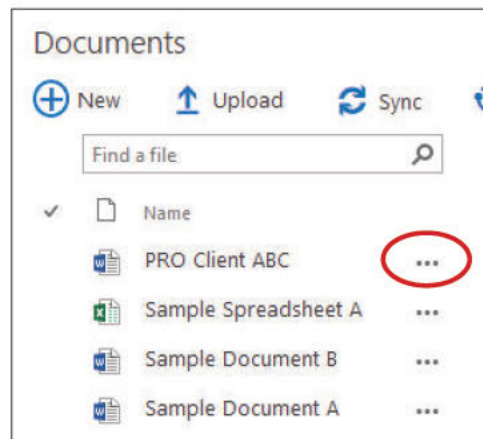


In the flyout window, click the elipses at the bottom.

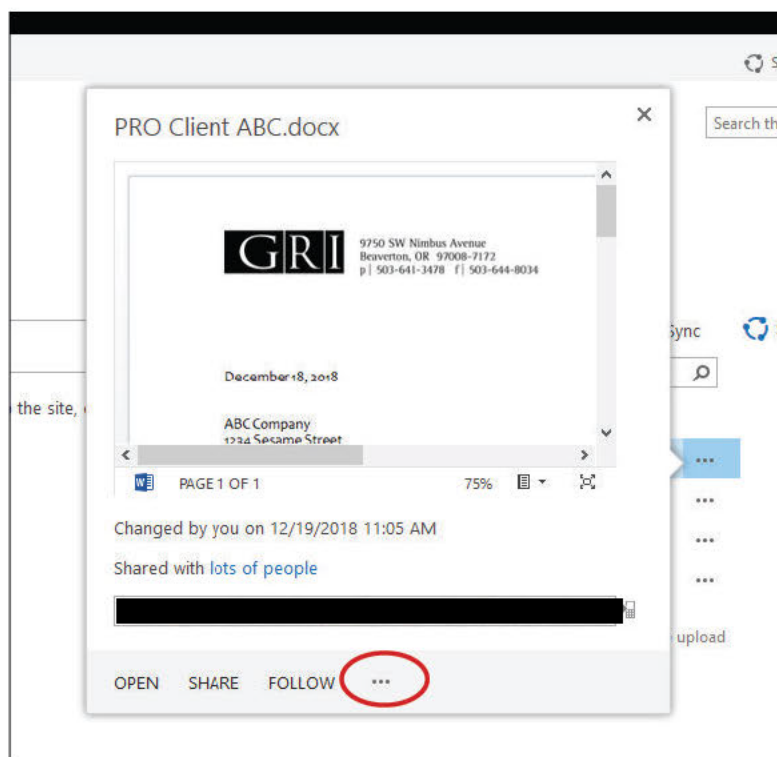


Click **Download**. Navigate to the Downloads folder on your local machine to find the file and save it to the appropriate folder on the GRI server.

Once a file has been saved to the appropriate location on the GRI server, delete the file from SharePoint by clicking the ellipses (...) next to the file name.



In the flyout window, click the ellipses at the bottom.



Click **Delete**.

