HOW TO USE SHAREPOINT WITH SYSTEMAGIC

QUICK GUIDE

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IN A NUTSHELL...

SharePoint Online is a document management and collaboration **tool** which is used to store all your important documents.

The platform enables file storage, sharing, searching, archiving and reporting on all stored documents allowing users to access all of their content from **any location.**

It can be used in many ways, from simple file storage, to real-time document collaboration, as an Intranet... it's very much up to you as a business **how many features** you use.
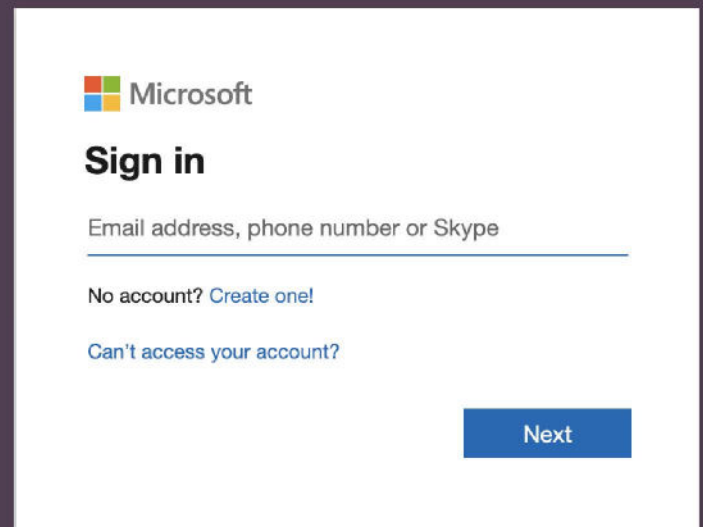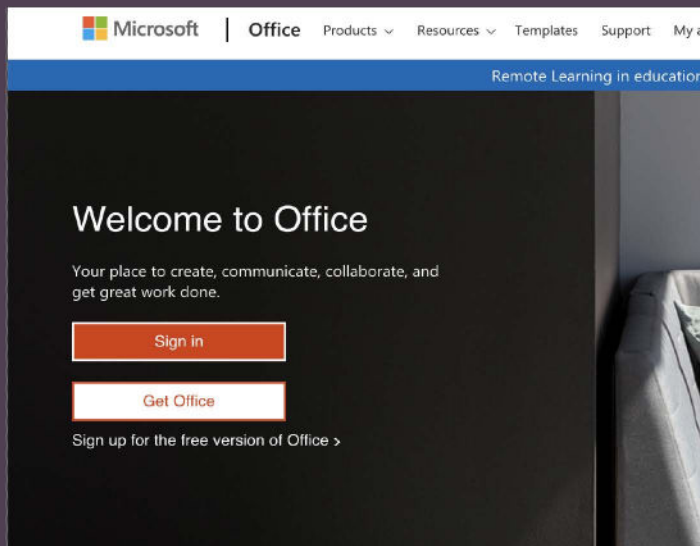
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HOW SHAREPOINT CAN BE ACCESSED

We will be accessing Sharepoint via a URL/Link in your browser. You can access SharePoint by going to

www.office.com

You should login to your Microsoft Account using your 365 email and password (I.e. the same password you use to access your emails.

HOW TO ACCESS FILES IN THE SHAREPOINT SITE

Once you've signed into your Microsoft account, your 'homepage' will appear. Click the 9 small dots in the top right corner. This will open your apps. From here, click Sharepoint.
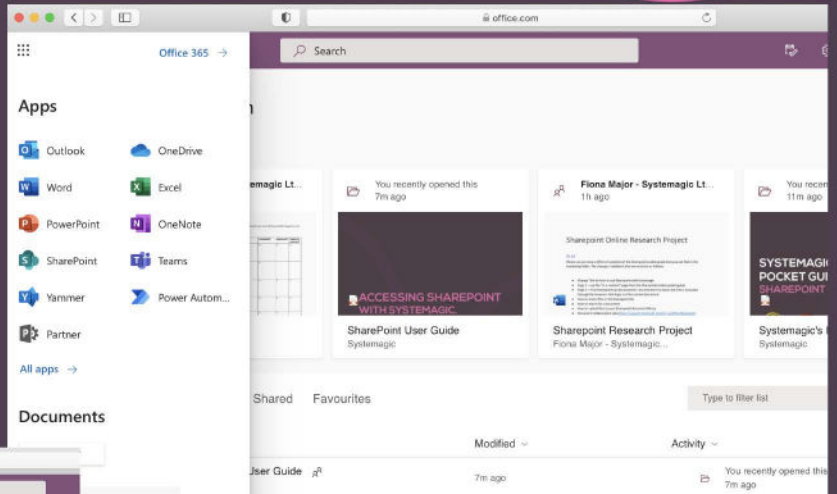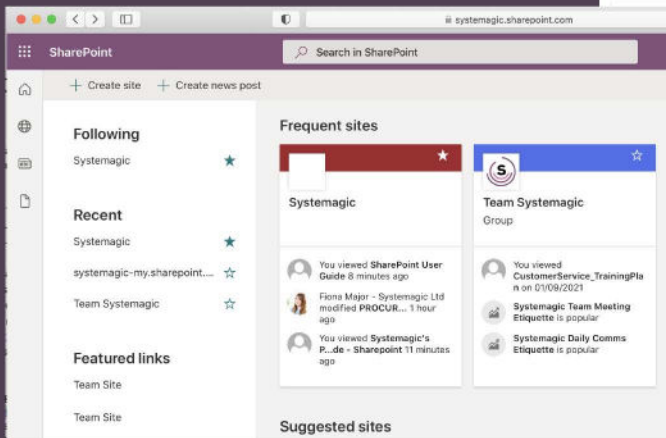
Your frequently visited sites will appear. You can access your files by either clicking on the relevant group on the left or in the middle of the page.

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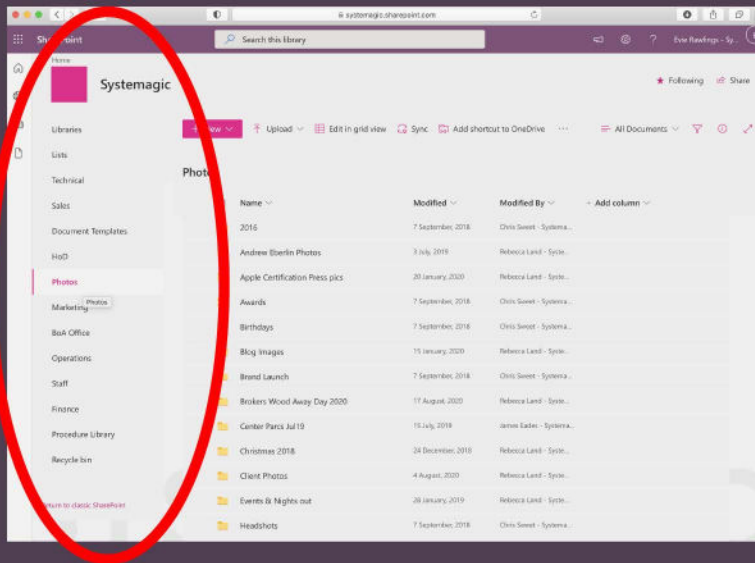
On the left hand side of the screen, You wiill see the **top-level** folders, if you click one of these folders, this will show all of the folders and documents within the top level folder.

From here, you can **navigate** to the files of choice. You are able to use the breadcrumb trail at the top of the page, to skip back through previous folders

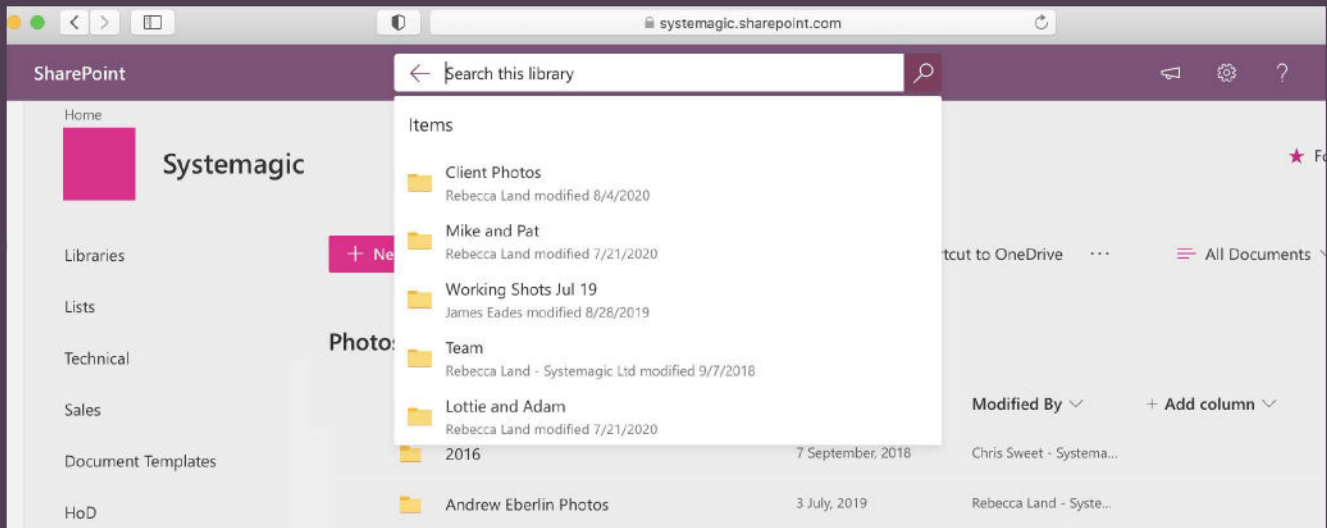Operations > Fiona > **Management Reports**

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HOW TO SEARCH FOR A DOCUMENT

At the top of the page, you will see a **search bar.** This is how you can find your documents. If you type in the **name** of the folder you are looking for and **press enter,** this will bring up all of the related search results underneath.
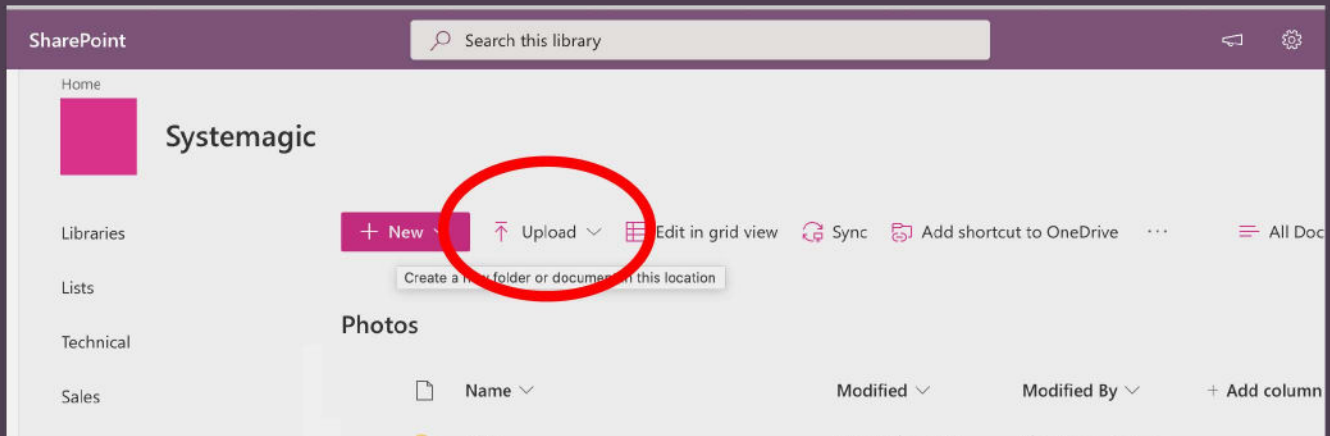

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HOW TO UPLOAD FILES TO YOUR SHAREPOINT DOCUMENT LIBRARY

If you are creating a new document, click on the pink 'New' button. This will give you a list of options to create documents using the Microsoft Suite, such as Word, Excel and Powerpoint.
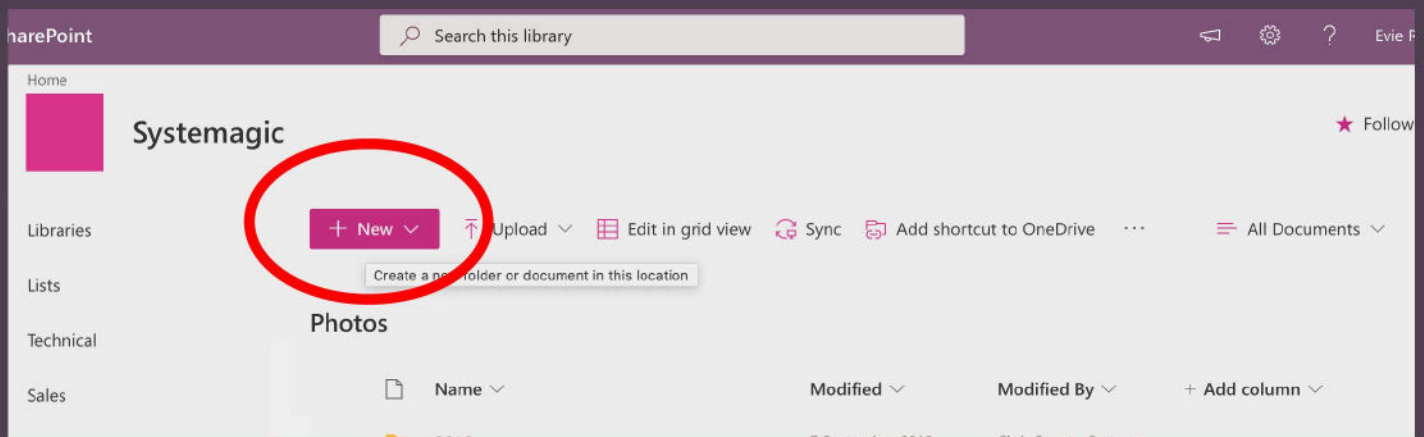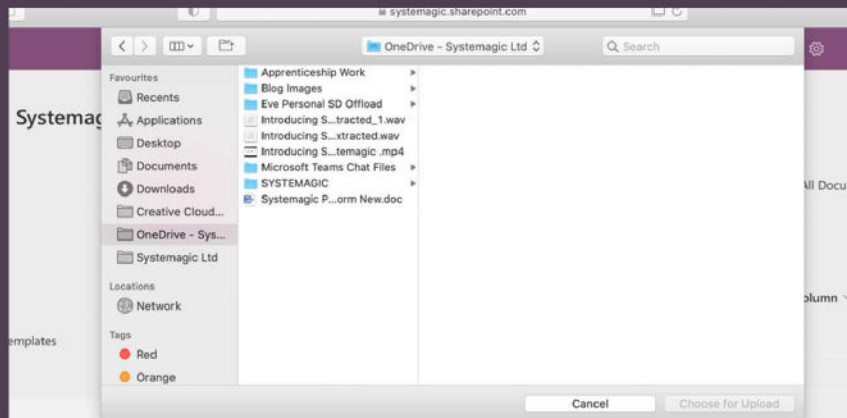

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If you would like to upload an **existing file,** you should press the upload button, next to the 'new' button.

This will then give you the option of uploading a file or a folder **from your machine.**
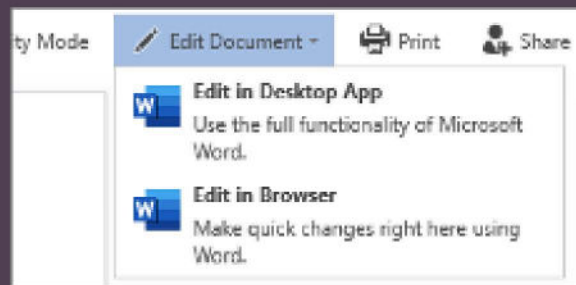

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DOCUMENT COLLABORATION

If a document is shared with you, you will receive **notification** of this in an email. This will include a **link** which will open the document on your web browser. Once opened, click 'edit document' and 'edit in browser'.
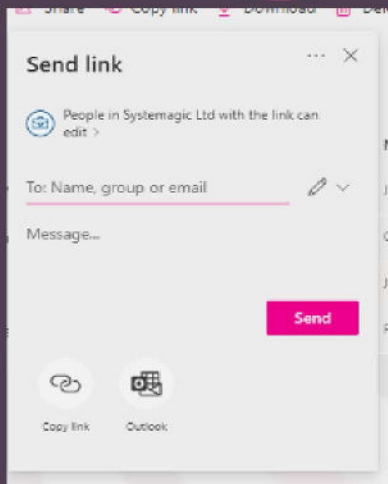

If anyone else if editing the document, you will see that they are present as their name will **appear.**

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HOW TO SHARE A DOCUMENT

To share a document, go to the document you wish to share and **right click** to bring up some options. Navigate down to **'Share'**. This will allow you to specify the email address that you wish to share the document with.

Alternatively, you can click the **'copy link'** or **'outlook'** button at the bottom of the window.

By copying the link, you can paste this into a document, email etc.

By clicking the Outlook button, this link will be pre-populated in a new email, ready for you to send to the user.

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That's all on how to use Sharepoint.

Contact Systemagic for any help you may need
01225809902
support@systemagic.co.uk

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