



SharePoint Online Reference Guide

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You can access the SharePoint online site by using the URL below in Chrome.

*Note that the <Microsoft Domain> value will need to be replaced with the one for your company.

<https://<Microsoft Domain>.sharepoint.com/sites/OfficeFiles/Documents>

1. When prompted login with your Microsoft account. You should only have to do this once.

1. Below is a reference for the SharePoint Documents page.

1. You can use the following steps to create a shortcut on your Desktop and Taskbar

1. Within the browser, click on the three dots in the upper right corner, then click "Cast, save, and share", and "Create Shortcut..."

2. Edit the name if needed, then click Create.

3. You can drag the shortcut down to your taskbar to also add a link there.
4. You can drag the Web page into a folder on your bookmarks bar to create a web shortcut.

If needed, you can do this for multiple SharePoint folders for quick access.

2. To open a folder simply click on the folder, it is a link.
 1. If you want to go back to a previous folder level, above the folders, click on the folder level you want to go back to, or click on Documents to go to the top level.

1. To search within a folder, type in the criteria within the Search box at the top. You can click the left arrow in the Search box to go back to the folder you were in.

Note - searching from the Document level will search the entire document site.

1. To open a file, click on the filename. The first time each file type is opened, you will be prompted to approve it.

Note - Office files such as Word, Excel, etc. will open using the corresponding Office application. However other filetypes such as PDF files will open within the browser.

1. To save a new file using Excel, click File then Save As. Then choose the SharePoint site, OfficeFiles, Documents, the folder you are attempting to save to, then name the file and click Save.

1. PDF viewing and editing with an app instead of the SharePoint browser.

When you click on a PDF in SharePoint, the default is to open it with the browser. That works fine for PDF viewing the majority of the time. In some cases, you may need to edit the PDF in a PDF editing program. We will use Nitro as an example.

1. Using Nitro to edit PDF files.

- a. Open Nitro. Click on OPEN then SharePoint.
- b. Paste the SharePoint URL listed at the top of this document and click ADD.
- c. Sign in – Work or School account
- d. Enter email and password when prompted and click Sign-In.
- e. Accept the Permissions request from Nitro.
- f. Your SharePoint site will be added. Click on it to open the site folders.
- g. Open the PDF you need to edit.
- h. Check the box to “Remember My Choice” and click “OPEN.”