

# *ABC Healthcare*



*Passion for quality. Commitment to care.*

## *SharePoint Site User Guide*

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### Note to Users

This user guide references fictional healthcare systems 'ABC Healthcare' and 'Xcel Healthcare Systems' in some step-by-step procedures and screenshot examples.

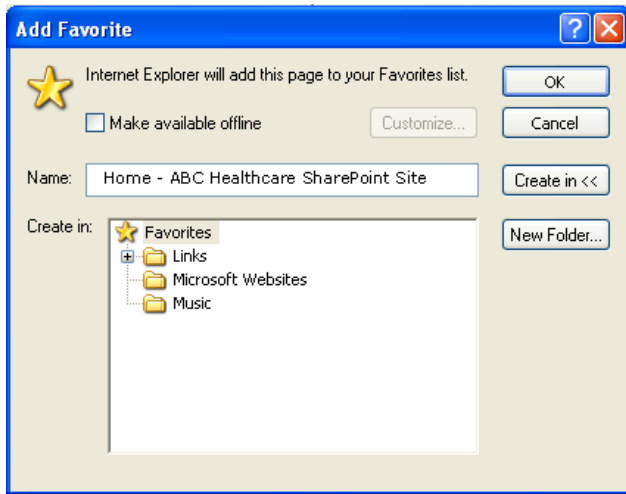
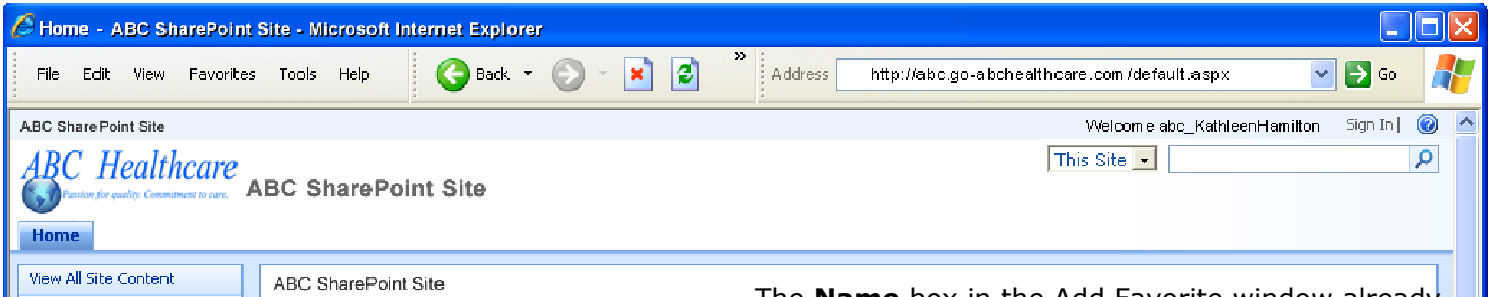
## Accessing the ABC SharePoint Site

The ABC SharePoint site is a central location where ABC Healthcare and members of your facility can: Retrieve information, such as invoices, billing reports, and other shared documents and resources.

- View the calendar and contact lists.
- Subscribe to email alerts for new invoices, new announcements, new calendar events, new shared documents, new contacts, and new links.

The new user receives an email notification with the **ABC Healthcare SharePoint Site** link, which opens the SharePoint site to the Home page.

To save this link, click **Favorites** on the Internet menu bar to view a drop-down menu. Select **Add to Favorites** to open the Add Favorite window.



The **Name** box in the Add Favorite window already says "Home – ABC Healthcare SharePoint Site," which is the name of the page that first appears when the SharePoint Site opens.

To open the ABC Healthcare SharePoint Site the next time, click **Favorites** to open the drop-down list, and then select "Home – ABC SharePoint Site," from the drop-down.

The **Sign In** link appears on the Home page. See "Signing In" next.

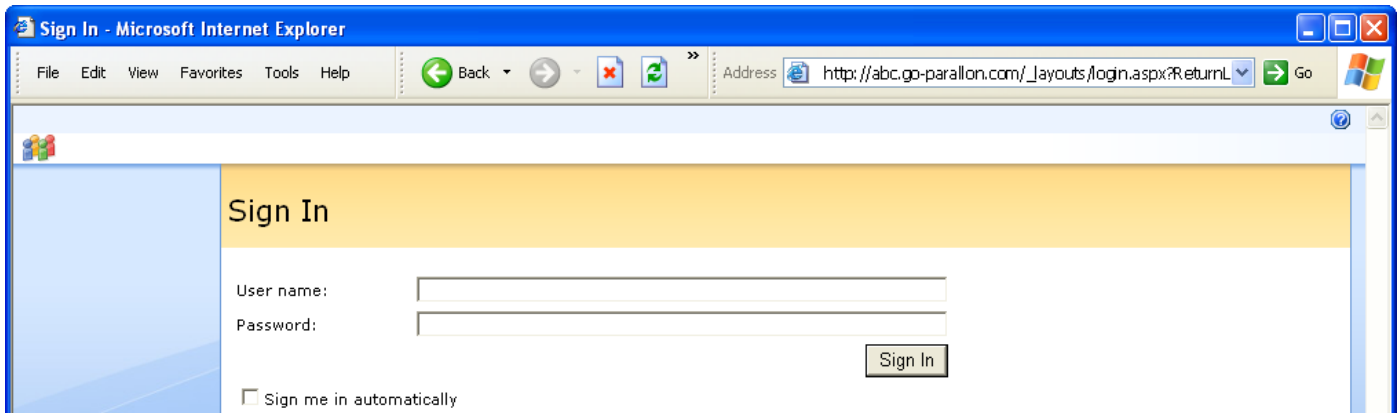


## Signing In to Your SharePoint Site



To view all site content, and to access the SharePoint site for your own facility, sign in with your **User Name** and a temporary **Password** assigned by your Site Administrator.

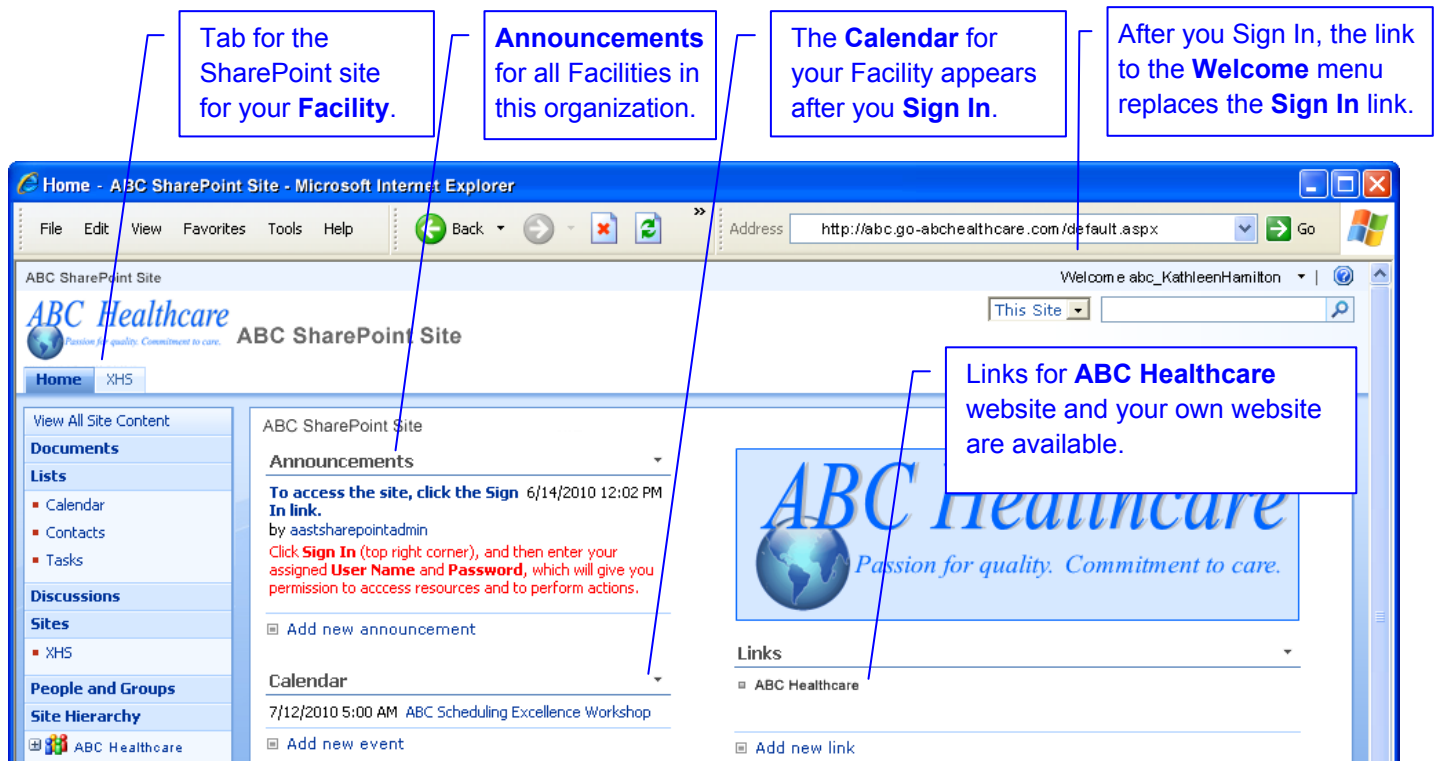
Click the **Sign In** link, in the top right corner of your Home page, to open the Sign In page.



## Viewing the Home Page

The SharePoint site opens to the Home page: ABC SharePoint Site. After you **Sign In**, a tab for your own Facility appears. On the **Home** page, only generic information is available.

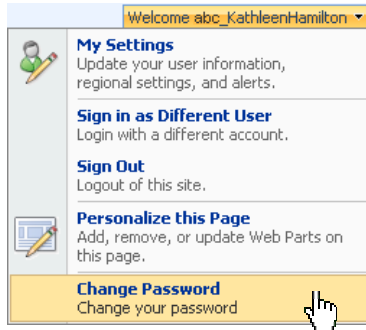
The content that you view on your SharePoint site is read-only.



## Changing Your Password

After your first **Sign In** with your assigned temporary password, you should change your password.

- 1 Click the **Welcome** arrow to open a drop-down menu, and select **Change Password**.



- 2 In the **Password** box, type your assigned password.

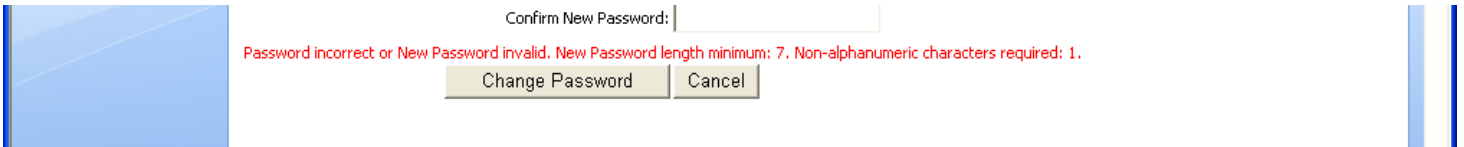
A screenshot of the "Change Your Password" form in a SharePoint site. At the top left, there is a link "Go back to site". The form title is "Change Your Password". It contains three input fields: "Password:", "New Password:", and "Confirm New Password:". Below the input fields are two buttons: "Change Password" and "Cancel". Below the buttons, there is a red "Please Note" section with the text: "The password you create must be a strong password. It must:" followed by a bulleted list of requirements: "be at least seven (7) characters long," "include at least one uppercase letter (A through Z) or one lowercase letter (a through z)," "include at least one numeral (0 through 9)," and "and include at least one non-alphanumeric character."

- 3 In the **New Password** box, type a new password. Notice the rules for a strong password.

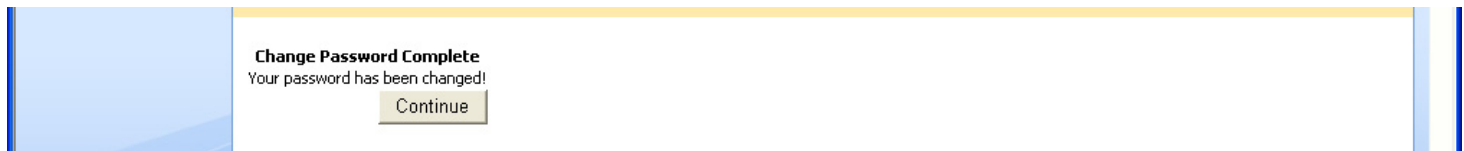
4 Type the same new password in the **Confirm New Password** text box.

5 Click the **Change Password** button.

If your new password does not follow all of the rules, a "Password Incorrect" message appears. Try again.



6 If the **Continue** button appears, your password is now changed, and you can click the **Continue** button to return to the SharePoint Site.



## Viewing Your SharePoint Site

Your facility has its own SharePoint Site, with its own **Announcements, Calendar, Contacts, People and Groups**, and **Links** to your website and also an **Email** link to contact the ABC Help Desk.

The screenshot shows the Xcel Healthcare SharePoint site interface. Several callout boxes provide additional information:

- Documents include Invoices and Shared Documents for each Facility in your organization.** (Points to the Documents section in the left sidebar)
- Announcements for your Site.** (Points to the Announcements section in the main content area)
- The Calendar for your Site is available after you Sign In.** (Points to the Calendar section in the main content area)
- The Welcome arrow opens a menu for Personal Settings, to Sign Out and to Change Password.** (Points to the 'Welcome abc\_KathleenHamilton' dropdown menu in the top right)
- Link to Email – ABC Healthcare Help Desk. to communicate issues or requests regarding your SharePoint Site.** (Points to the 'Email - ABC Healthcare Help Desk' link in the Links section)
- Link to the website for your own Facility.** (Points to the 'Xcel Healthcare Systems' link in the Links section)

## Using the SharePoint Navigation Panel

The Navigation panel on your SharePoint Site has links to All Site Content, such as Documents, Lists, Discussions, Sites, and People and Groups. The links are available only after you **Sign In**.



### Documents

- Invoices  
 The **Invoices** page has a folder for each Facility, with read-only invoices.
- Shared Documents  
 The **Shared Documents** page has a **Resources** folder with documents that you can view or download.

### Lists

XHS members can view several Lists, such as a Calendar and Contacts.

- Calendar  
 The **Calendar** shows any scheduled events for this organization.
- Contacts  
 The **Contacts** list shows contacts by Last/First Name, Company, Business and Home Phone, and Email address.
- Tasks  
 The list of **Tasks** assigned to members.
- XHS Administration  
 The list of **Administration Tasks** assigned by a designated Task Administrator for your SharePoint Site.

### People and Groups

This page shows a list of group members of this Site. The Site Administrator can give permissions to this group to contribute content to their Site.

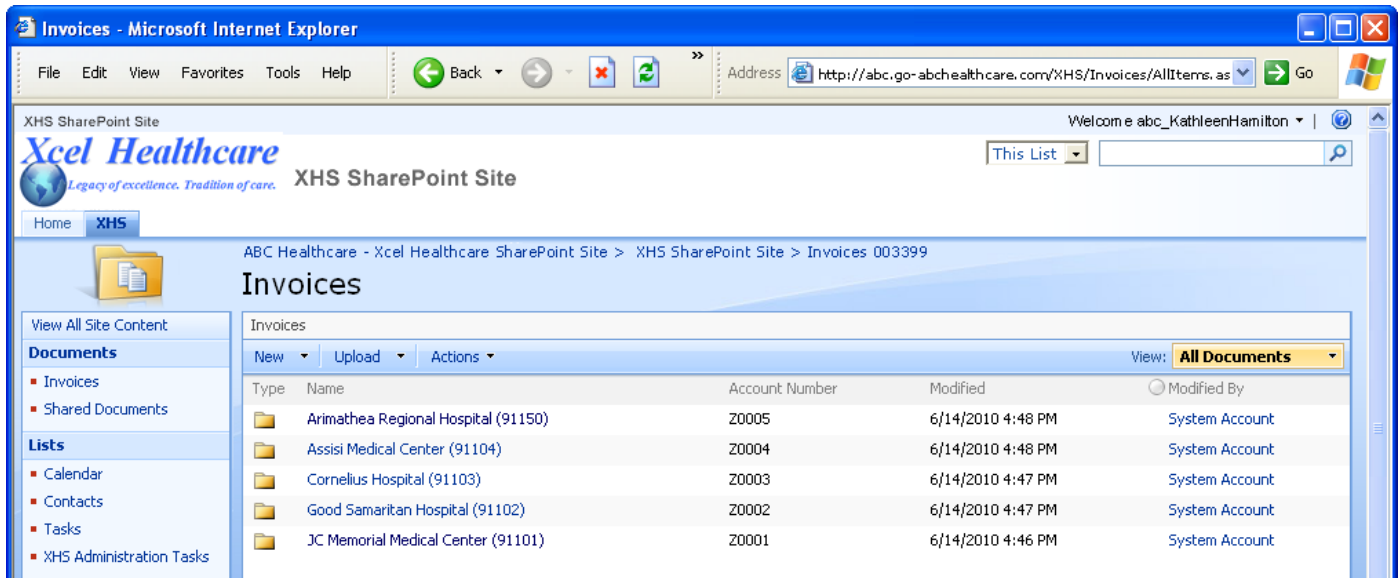
### Site Hierarchy

The Site Hierarchy provides a Tree View of the site content.

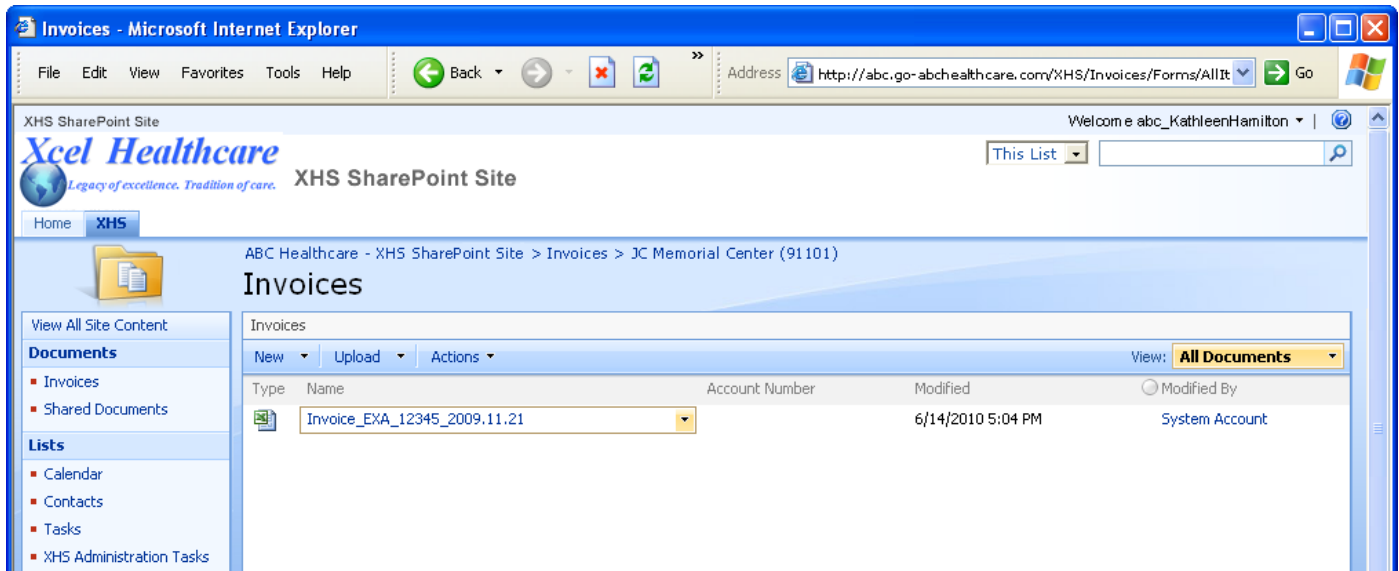


## Viewing Invoices

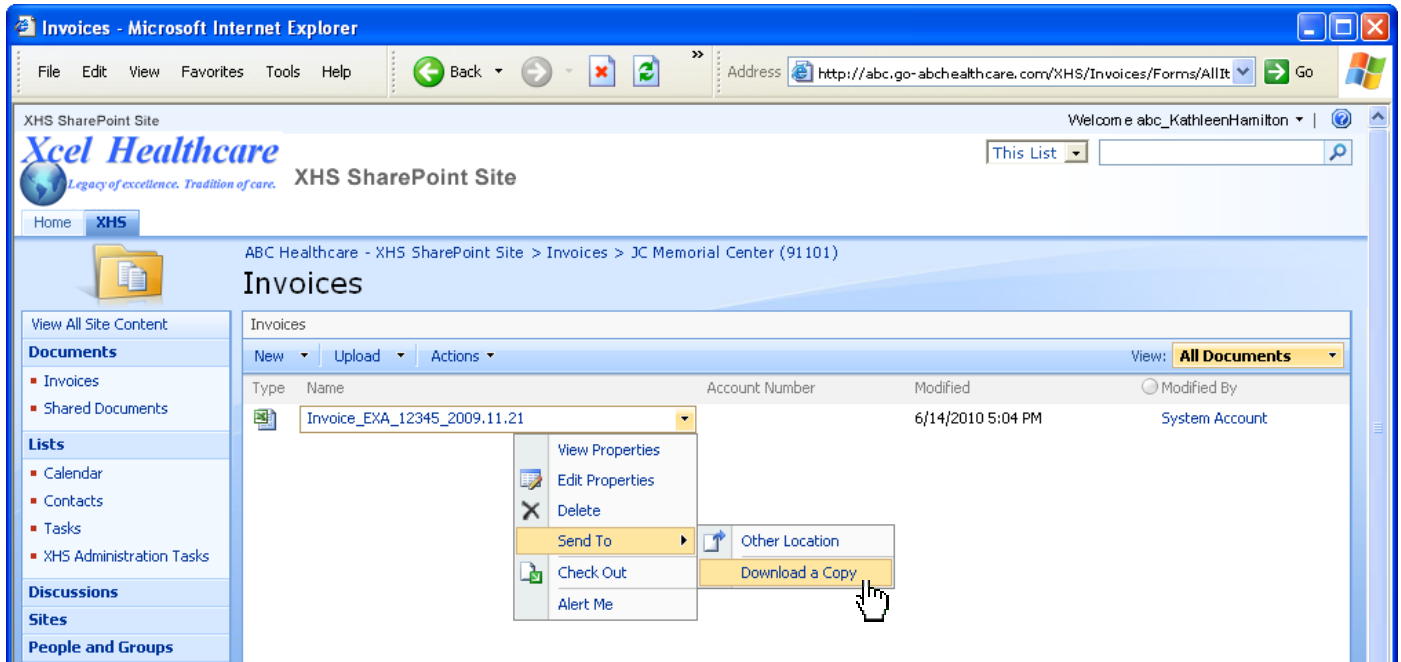
- To view invoices, click the **Invoices** link.  
 The Invoices page shows a folder for each facility.



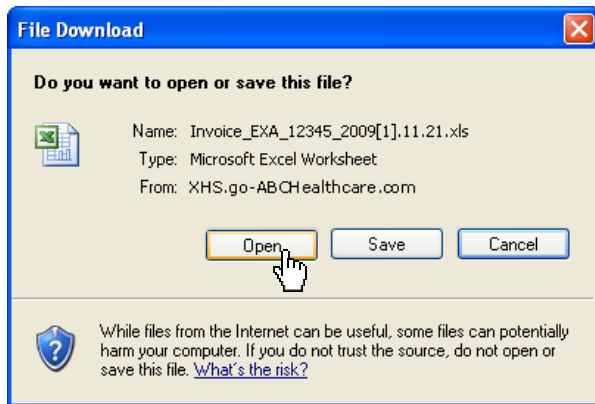
- Click a facility folder to expand the folder and view all invoices for the selected facility.



- To view this invoice, click the Invoice name or click the **Invoice** arrow to open a drop-down menu, select **Send To**, and select **Download a Copy**.



- In the File Download window, click **Open**. You can save the file later, after you open it.



The **Invoice** detail spreadsheet opens in Excel.

If a message appears that asks if you want to update links to data sources, click **Don't Update**.

This is a sample invoice.

The **Invoice** tab displays details.

The screenshot shows a Microsoft Excel window titled "Invoice\_EXA\_12345\_2009[1].11.21.xls". The spreadsheet contains an invoice report for "Example Hospital" created on November 23, 2009. The report includes a table of invoice items with columns for Facility, Svc, Svc Date, Area, LCL/TRV, Provider, Nurse, Class, Hours, Total, Rate, Extended, Tx, Typ, O/T, Comm, Reference, EIN, and GL Description. A warning dialog box is displayed over the spreadsheet, stating: "This workbook contains links to other data sources. If you update the links, Excel will attempt to retrieve the latest data. If you don't update the links, Excel will use the previous information. Note that data links can be used to access and share confidential information without your permission and possibly perform other harmful actions. Do not update the links if you do not trust the source of this workbook." The dialog box has three buttons: "Update", "Don't Update", and "Help". The "Don't Update" button is highlighted by the mouse cursor.

Facil	Svc	Svc Date	Area	LCL/TRV	Provid	Nurse	Clas	Hours	Total	Rat	Extende	Tx	Typ	O/T	Comm	Reference	EIN	GL Description	
11	EXA	Nov-09	11/02/2009 (746)	CARDIAC CATH LAB	LCL	XHS	MARTINEAU E	R.N.	7:00AM-5:00PM	9.50	51.00	484.50	REG	P	No	XHS 11/14/09	7013390356	RNS Contract Lat	
12	EXA	Nov-09	11/02/2009 (780)	EMERGENCY ROOM	LCL	XHS	JONES C	R.N.	7:00PM-7:45AM	12.25	53.00	649.25	REG	P	No	XHS 11/14/09	7120934036	RNS Contract Lat	
13	EXA	Nov-09	11/11/2009 (728)	RADIOLOGY	LCL	XHS	PHILLIPS-GAY E	R.N.	8:00AM-4:30PM	8.00	51.00	408.00	REG	P	No	XHS 11/14/09	7136133481	RNS Contract Lat	
14	EXA	Nov-09	11/11/2009 (728)	RADIOLOGY	LCL														
15	EXA	Nov-09	11/11/2009 (780)	EMERGENCY ROOM	LCL														
16	EXA	Nov-09	11/11/2009 (780)	EMERGENCY ROOM	LCL														
17	EXA	Nov-09	11/12/2009 (622)	5TH FL MED SURG	LCL														
18	EXA	Nov-09	11/12/2009 (622)	5TH FL MED SURG	LCL														
19	EXA	Nov-09	11/12/2009 (746)	CARDIAC CATH LAB	LCL														
20	EXA	Nov-09	11/13/2009 (780)	EMERGENCY ROOM	TRV														
21	EXA	Nov-09	11/13/2009 (780)	EMERGENCY ROOM	TRV														
22	EXA	Nov-09	11/13/2009 (780)	EMERGENCY ROOM	LCL														
23	EXA	Nov-09	11/13/2009 (780)	EMERGENCY ROOM	LCL														
24	EXA	Nov-09	11/14/2009 (650)	ICU 2ND FL	LCL														
25	EXA	Nov-09	11/14/2009 (650)	ICU 2ND FL	LCL														
26	EXA	Nov-09	11/14/2009 (650)	ICU 2ND FL	LCL														
27	EXA	Nov-09	11/14/2009 (704)	PACU	LCL														
28	EXA	Nov-09	11/14/2009 (704)	PACU	LCL	XHS	LAPIERRE S	R.N.	7:30PM-12:30PM	17.00	5.00	85.00	DN-CALL N	No		XHS 11/14/09	7081592476	RNS Contract Lat	
29	EXA	Nov-09	11/14/2009 (780)	EMERGENCY ROOM	TRV	XHS	BRITO A	R.N.	7:00PM-7:30PM	12.00	58.00	696.00	REG	P	No	XHS 11/14/09	7034133718	RNS Contract Lat	
30	EXA	Nov-09	11/14/2009 (780)	EMERGENCY ROOM	LCL	XHS	DESSALINES K	R.N.	7:00PM-7:45AM	12.25	54.00	661.50	REG	P	No	XHS 11/14/09	7036857836	RNS Contract Lat	
31	<b>Total</b>																		
32																			
33	<b>Header</b>	<b>Description</b>																	
34	<b>Facility</b>	Facility abbreviated Name																	
35	<b>Svc Mth</b>	Month of shift worked																	
36	<b>Svc Date</b>	Worked shift date																	
37	<b>Area</b>	Cost center or department																	
38	<b>LCL/TRV</b>	Local or travel employee																	
39	<b>Provider</b>	XHS HEALTHCARE or Agency name																	
40	<b>Nurse</b>	Nurse last name																	
41	<b>Class</b>	Nurse classification																	
42	<b>Hours</b>	In & out times																	
43	<b>Total</b>	Total hours worked																	
44	<b>Rate</b>	Hourly rate																	

**5** Click the **Date** tab to view invoice totals.

The screenshot shows a Microsoft Excel window titled "Invoice\_EXA\_12345\_2009.11.21.xls". The spreadsheet displays an invoice from Xcel Healthcare. The invoice number is EXA\_12345\_2009.11.21. The customer is Example Hospital, with a date of 11/21/09. The invoice contains one line item: "XHS Billing 1/15/09-11/21/09" with a total of \$47,124.01. The subtotal is also \$47,124.01, and the final total is \$47,124.01. The spreadsheet also includes a "Remit payment to:" section with the Xcel Healthcare address.

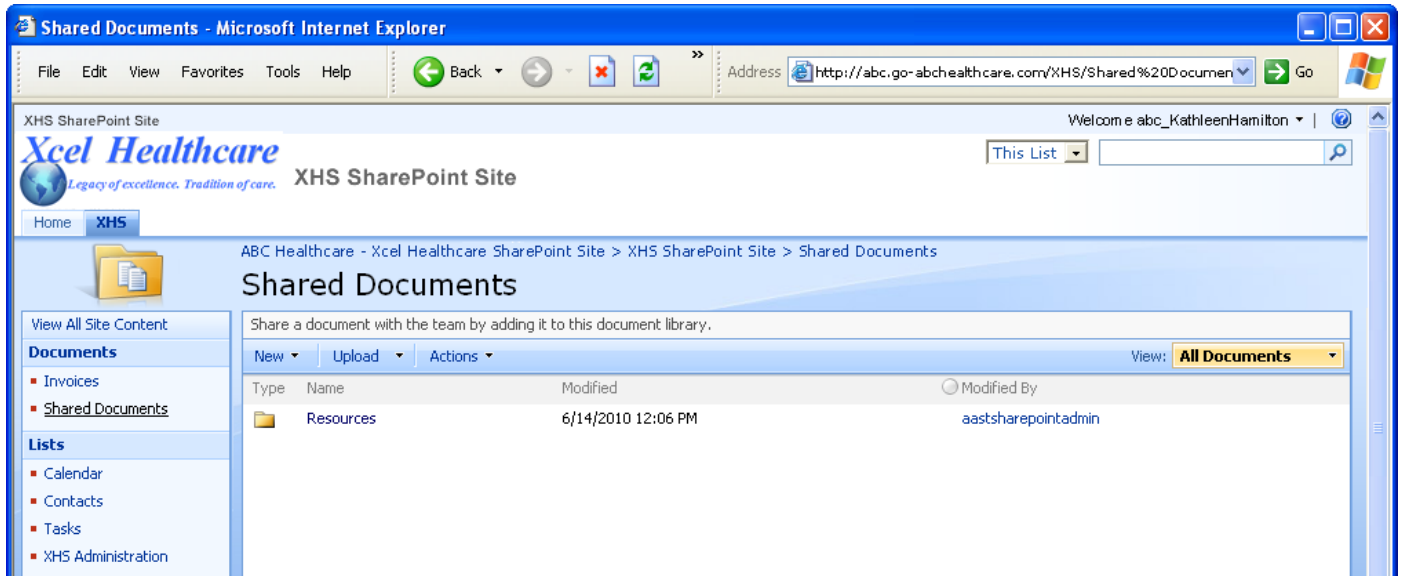
Item	Description	TOTAL
1	XHS Billing 1/15/09-11/21/09 See 'Invoice' tab for billing detail	\$47,124.01
SubTotal		\$47,124.01
		\$0.00
<b>TOTAL</b>		<b>\$47,124.01</b>

**6** Click the **Close** button in Excel to return to your SharePoint Site.

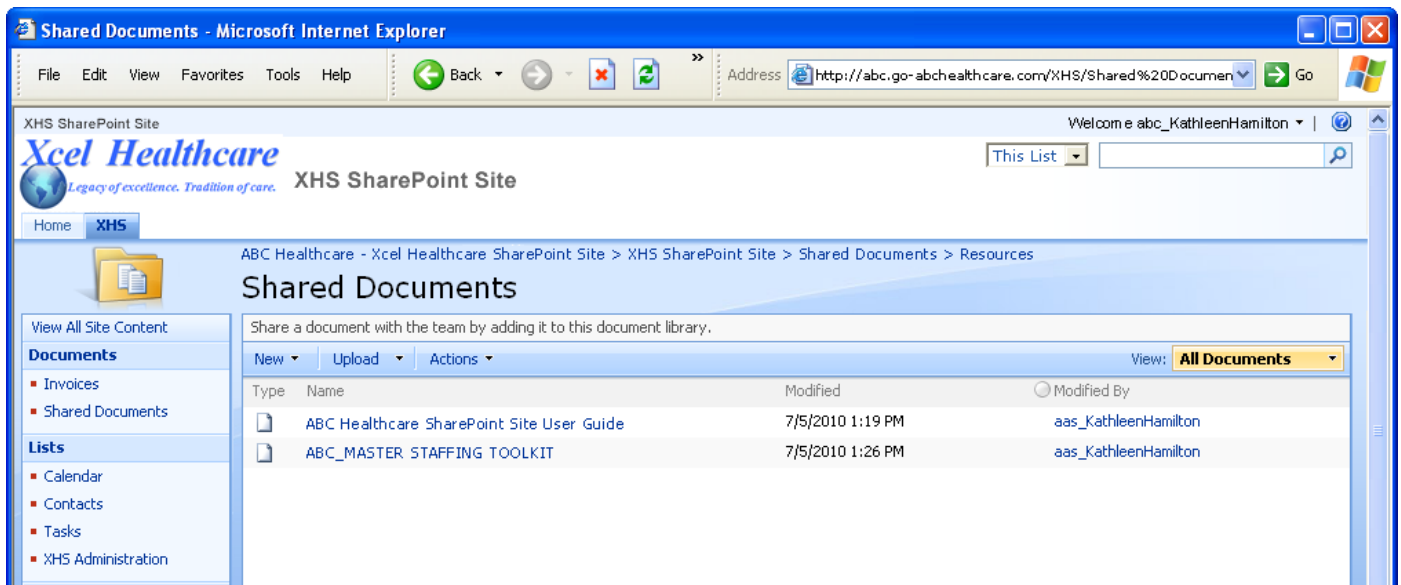
## Viewing Shared Documents

Users can also view documents in the **Shared Documents** folder.

- 1 Click the **Shared Documents** link to open the Shared Documents page, which has a **Resources** folder.



- 3 Click the **Resources** folder to see a list of Resource documents that you can view, such as the **ABC Healthcare SharePoint Site User Guide**, and the **ABC Master Staffing Toolkit**.



## Viewing the Calendar

Users also share several Lists, such as a **Calendar**.

- 1 In the navigation panel, click the **Calendar** link to open a calendar for the current month, where you can view scheduled events.

Calendar - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address: http://abc.go-abchealthcare.com/XHS/Lists/Calendar/calen

XHS SharePoint Site

Welcome abc\_KathleenHamilton

Xcel Healthcare  
 Legacy of excellence. Tradition of care.

Home XHS

ABC Healthcare - XHS SharePoint Site > Calendar

Calendar

Use the Calendar list to keep informed of upcoming meetings, deadlines, and other important events.

New Actions View: Calendar

July, 2010

Expand All Collapse All | Day Week Month

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
27	28	29	30	1	2	3
4	5	6	7	8	9 2:00 PM Xcel Scheduling Excellence Demo	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24

Documents

- Invoices
- Shared Documents

Lists

- Calendar
- Contacts
- Tasks
- XHS Administration

Discussions

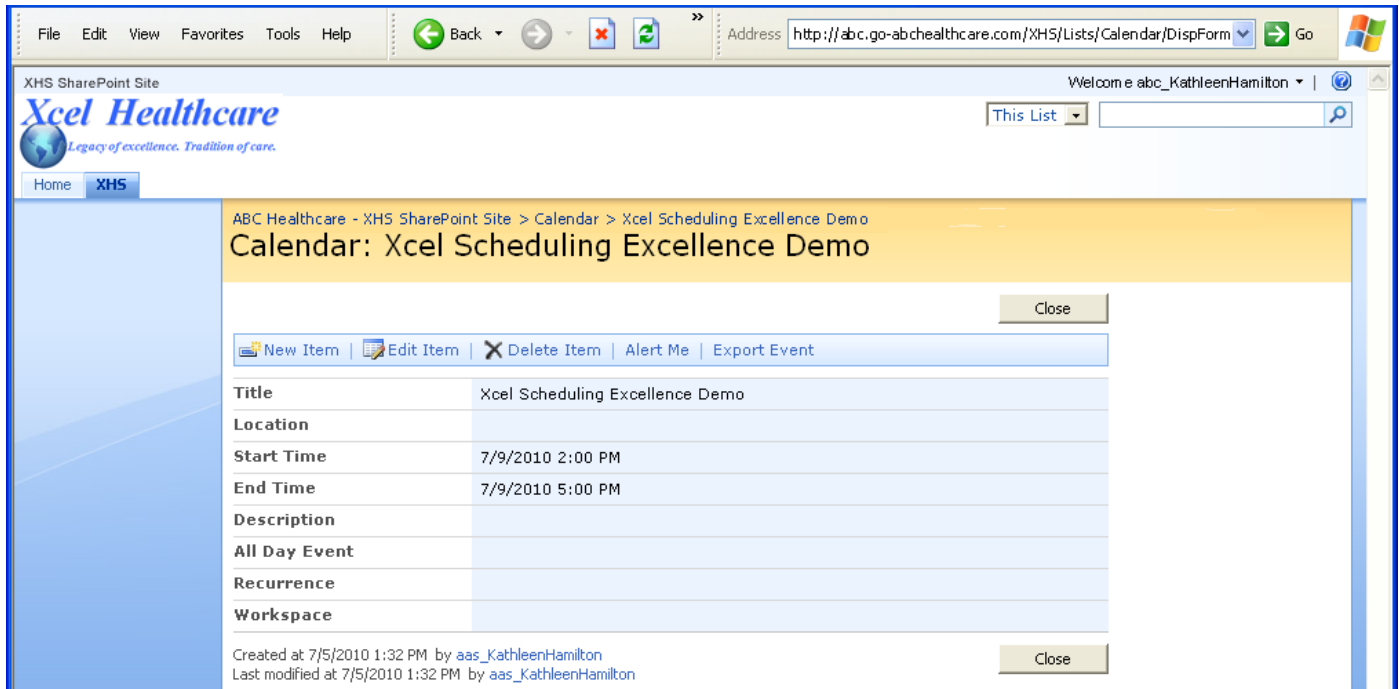
Sites

People and Groups

Site Hierarchy

- Invoices
- Shared Documents
- Announcements
- Calendar

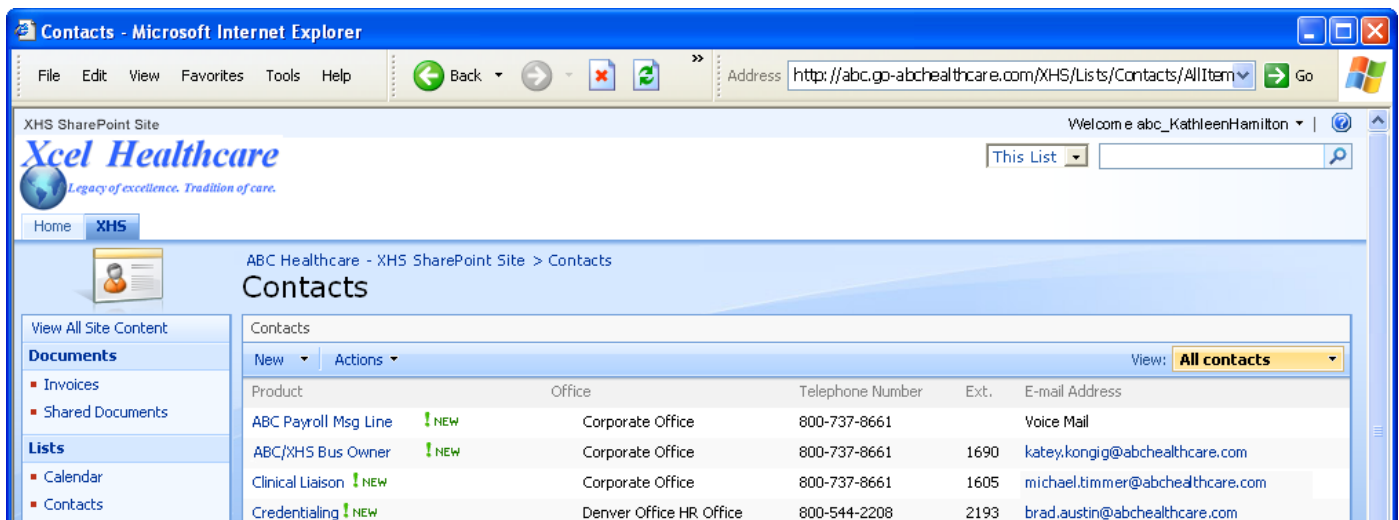
2 To view details for a scheduled event, click the event.



## Viewing Contacts

Users also share several Lists, such as a list of **Contacts**.

- 1 In the navigation panel, click the **Contacts** link to open a list of Contacts for your SharePoint Site. Contacts are listed by **Product, Office, Phone, and Email Address**.



- 2 To send an email to a Contact, click the E-mail Address to open an email with the "To" address already filled in.



## Viewing People and Groups

**People and Groups** is a list of each user Group in your organization—and your parent organization, ABC Healthcare—with their Job Title and Department.

You can view People in any Group that you belong to. In the navigation panel, under **Groups**, there is a link for each Group: **Members, Owners, Visitors, Users, Task Administrators**, and a group for each **Facility** in the SharePoint Site for your facility.

- 1 In the navigation panel, click the **People and Groups** link to open a list of People in the first group in the list: Members.

Members have permissions to **Read** and to **Contribute** content to their SharePoint Site.

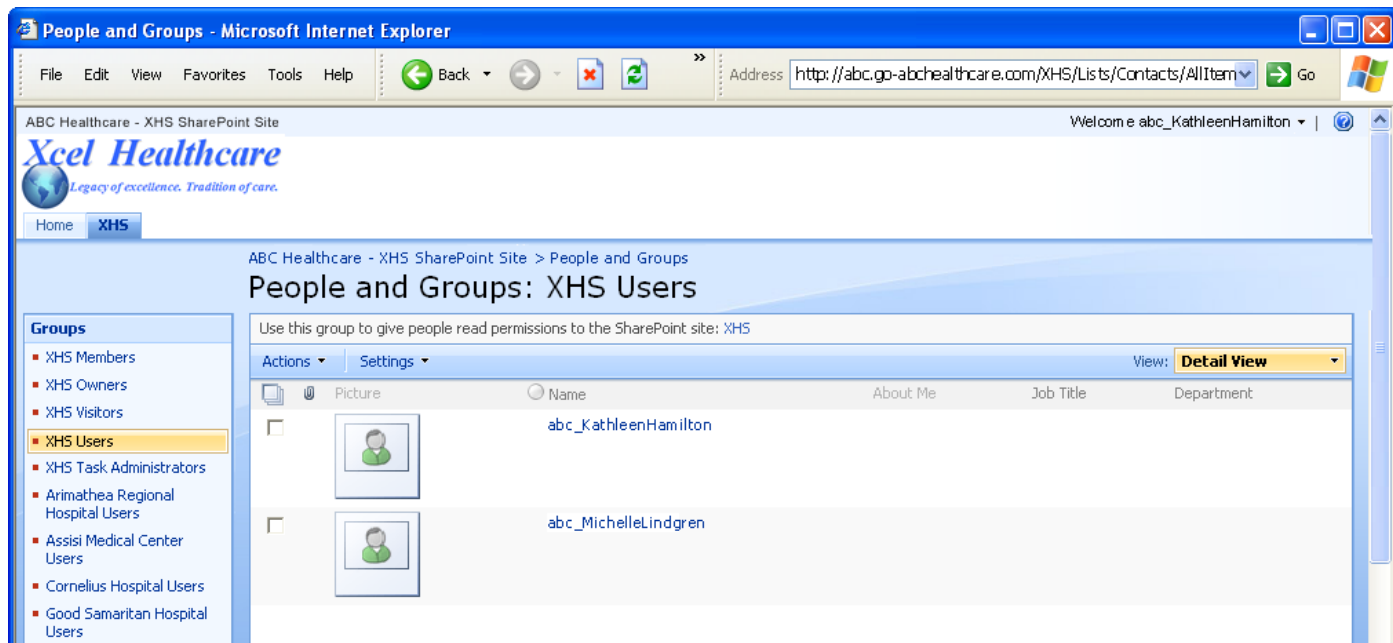
The screenshot shows a Microsoft Internet Explorer browser window displaying the 'People and Groups' page for 'XHS Members' on the 'XHS SharePoint Site'. The browser's address bar shows the URL: `http://abc.go-abchealthcare.com/XHS/Lists/Contacts/AllItem`. The page header includes the 'Xcel Healthcare' logo and the text 'Legacy of excellence. Tradition of care.' Below the header, the page title is 'People and Groups: XHS Members'. A navigation panel on the left lists various groups under 'Groups' and 'All People'. The main content area displays a table of group members with columns for 'Picture', 'Name', 'About Me', 'Job Title', and 'Department'. The table lists several members, including 'abc\_KathleenHamilton', 'abc\_MichelleLindgren', 'admintaskuser', 'fredjefferson', 'gregsimson', and 'perrycastle'. Each member has a small profile picture icon to the left of their name.

Picture	Name	About Me	Job Title	Department
	abc_KathleenHamilton			
	abc_MichelleLindgren			
	admintaskuser			
	fredjefferson			
	gregsimson			
	perrycastle			



- 2 To view People in any other Group that you belong to, click the link for that Group in the navigation panel. For example, click **Users**.

Users have permissions to **Read** content on their SharePoint Site.



- 3 If you click a Group that you do not belong to, a message says that "You do not have permission to view the membership of the group."

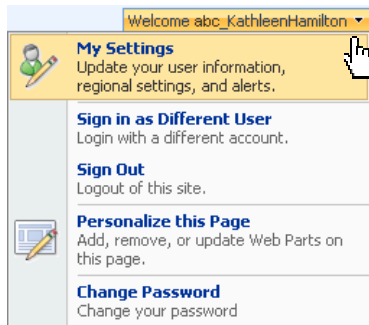
Owners have permissions for full control of their SharePoint Site.



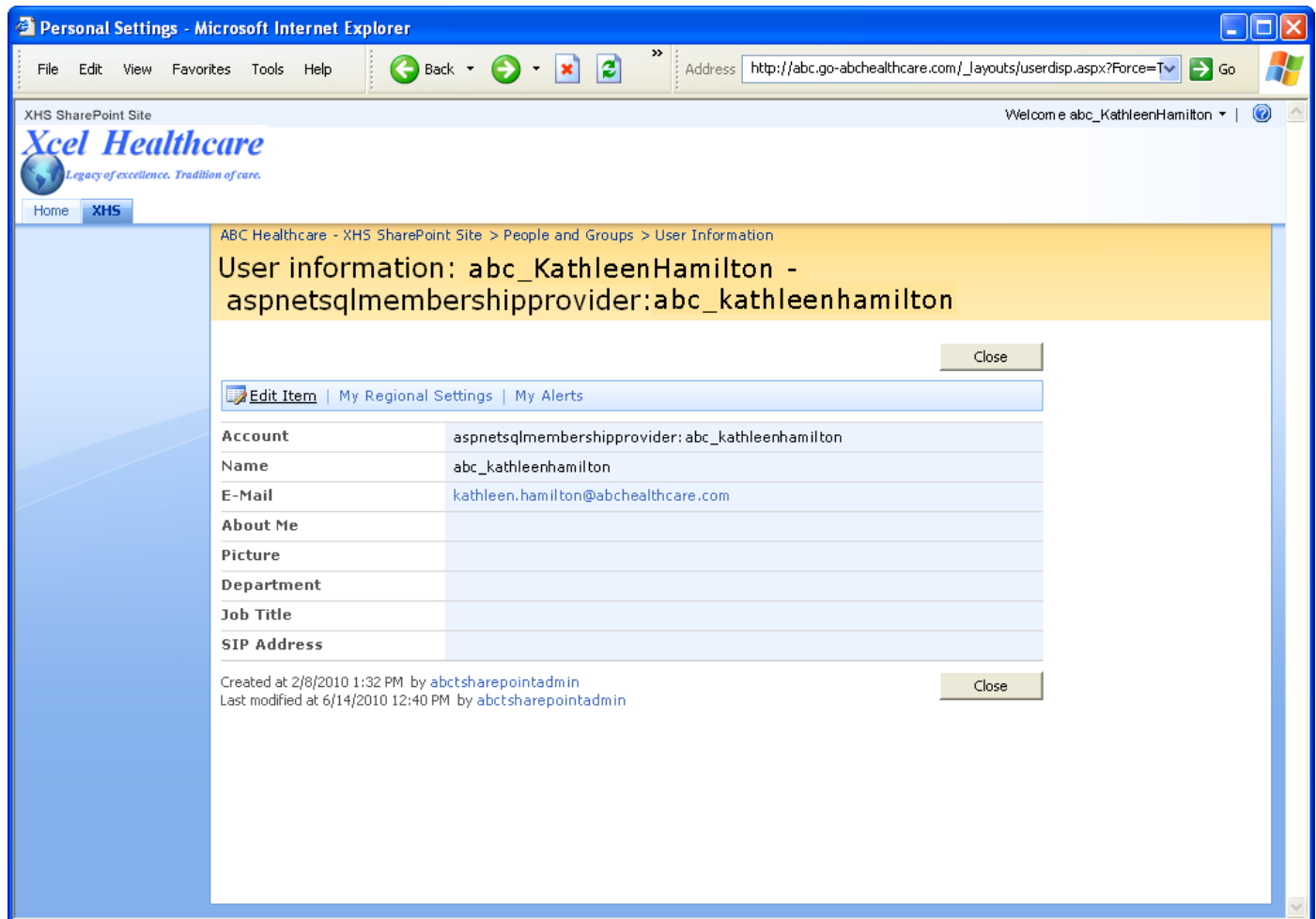
## Updating your Email Address

if you want to subscribe to email alerts, you need to verify that your email address in your SharePoint **Personal Settings** page is correct.

- To view or update your email address, click the **Welcome** arrow to open a drop-down menu, and select the **My Settings** link, which opens the Personal Settings page.

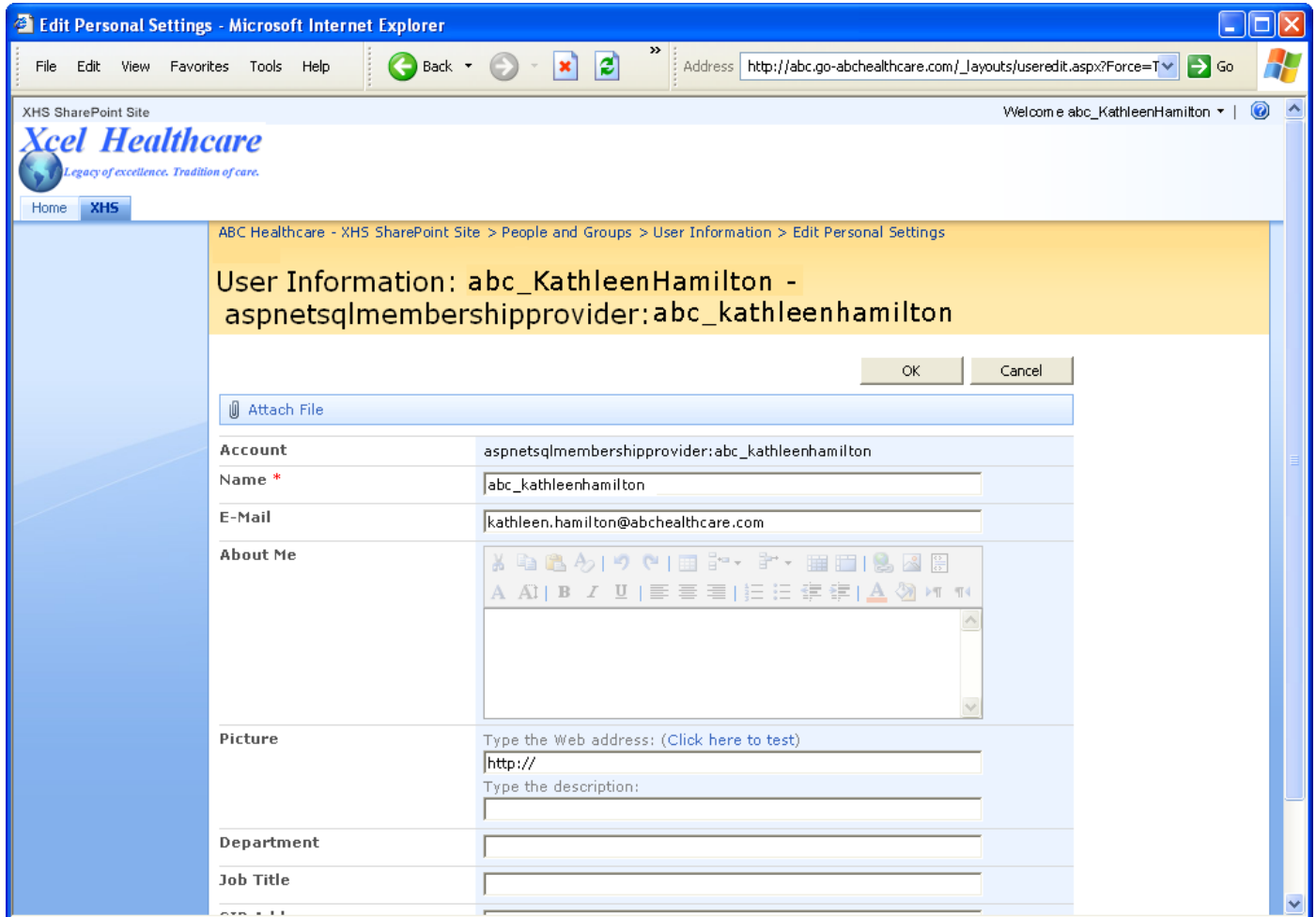


The Personal Settings page opens.



2 Click the **Edit Item** link.

The Edit Personal Settings page opens.



3 In the **E-Mail** text box, type your email or your correction.

4 Click **OK**.

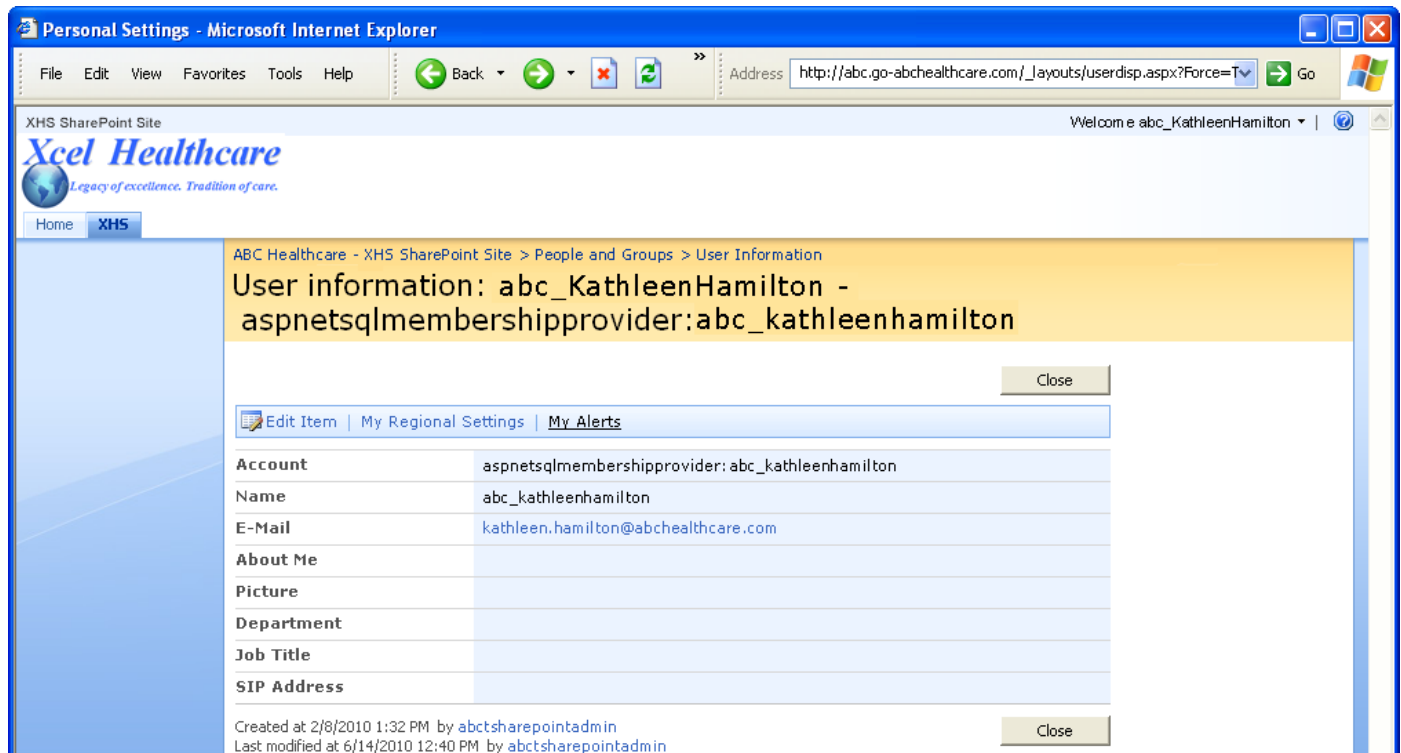
## Creating an Email Alert

E-mail alerts are available when new information is posted or current information is updated.

You can subscribe to email alerts for new invoices, new shared documents, new announcements, new calendar events, new contacts, and new links.

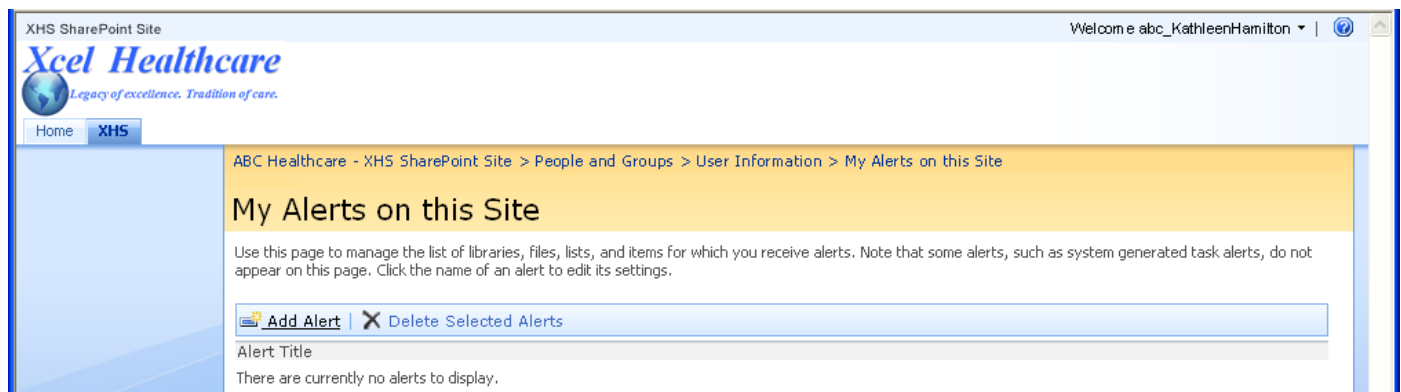
**If you want to subscribe to email alerts, you need to verify your email address in your Personal Settings page.**

- 1 To create an email Alert, click the **Welcome** arrow to open a drop-down menu, and select the **My Settings** link, which opens the Personal Settings page.



- 2 Click the link for **My Alerts**.

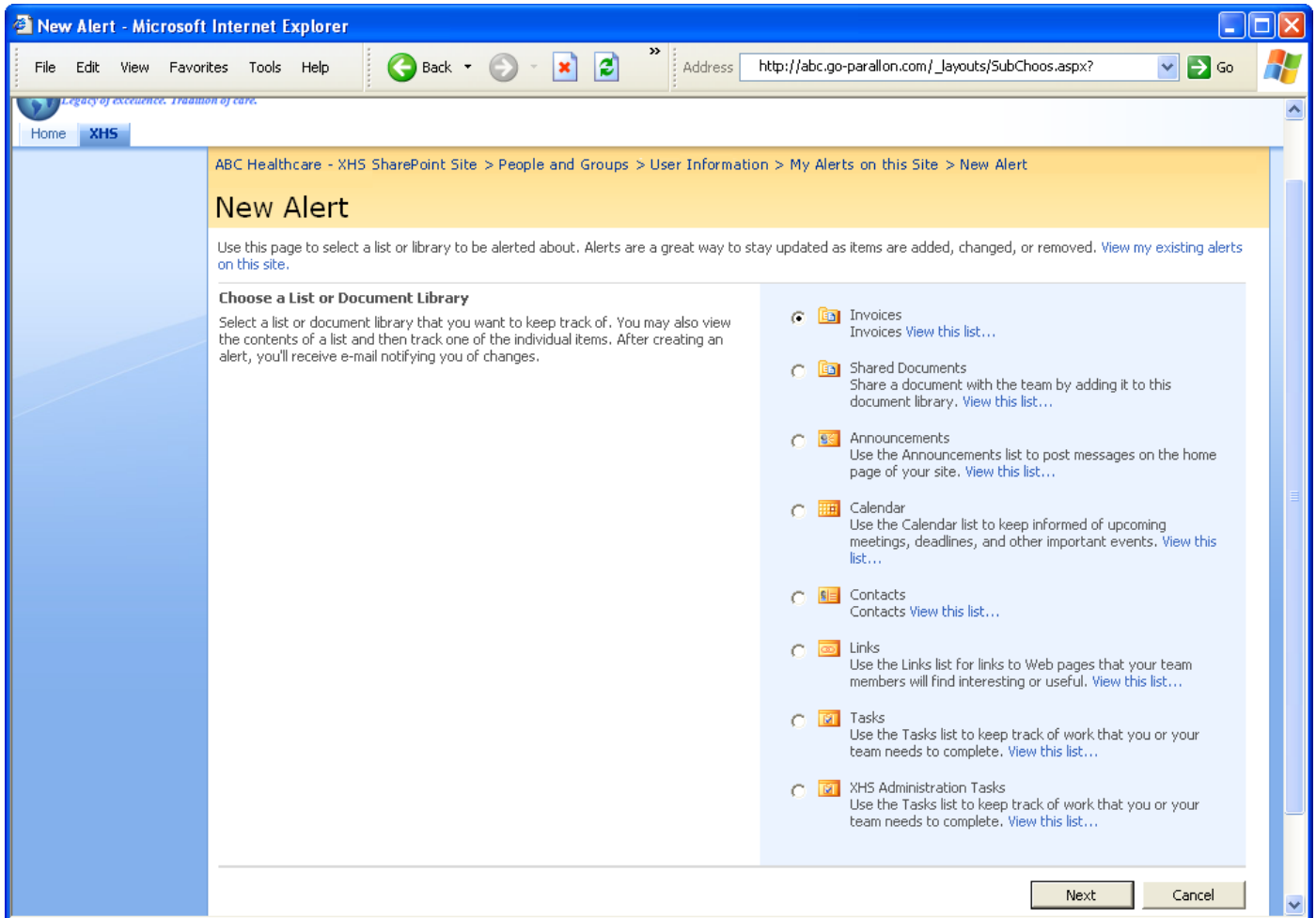
The My Alerts page opens.



**3** Click the **Add Alert** link.

The New Alert page opens.

Notice that you can create alerts for new **Invoices**, **Shared Documents**, **Announcements**, new **Calendar** events, new **Contacts**, new **Links**, and new **Tasks**.



**4** Select the **Invoices** option.

5 Click the **Next** button. The details page opens, where you can define:

- Exactly when you want to receive alerts.
- For what types of changes.
- How frequently you want the alerts sent, such as immediately, daily, or weekly.

If you select daily alerts, you need to define the time of day you want to receive the alerts.

If you select weekly alerts, define the day of week and time of day to receive the alerts.

When to receive alerts: Immediately, Daily, or Weekly.

Change Type: All, Added items, Modified items, Deleted Items, or Web Discussions.

Changes by Someone else: Someone else changes a document, Someone changes a document I created, or Someone changes a document I modified.

**New Alert - Microsoft Internet Explorer**

File Edit View Favorites Tools Help

Back Forward Stop Refresh Address [http://abc.go-abchealthcare.com/\\_layouts/SubNew.aspx?List=%](http://abc.go-abchealthcare.com/_layouts/SubNew.aspx?List=%) Go

**Alert Title**  
 Enter the title for this alert. This is included in the subject of the e-mail notification sent for this alert.

**Send Alerts To**  
 This alert will be sent to the e-mail address indicated.  
 E-mail address:

**Change Type**  
 Specify the type of changes that you want to be alerted to.

Only send me alerts when:

All changes  
 New items are added  
 Existing items are modified  
 Items are deleted  
 Web discussion updates

**Send Alerts for These Changes**  
 Specify whether to filter alerts based on specific criteria. You may also restrict your alerts to only include items that show in a particular view.

Send me an alert when:

Anything changes  
 Someone else changes a document  
 Someone else changes a document created by me  
 Someone else changes a document last modified by me

**When to Send Alerts**  
 Specify how frequently you want to be alerted.

Send e-mail immediately  
 Send a daily summary  
 Send a weekly summary

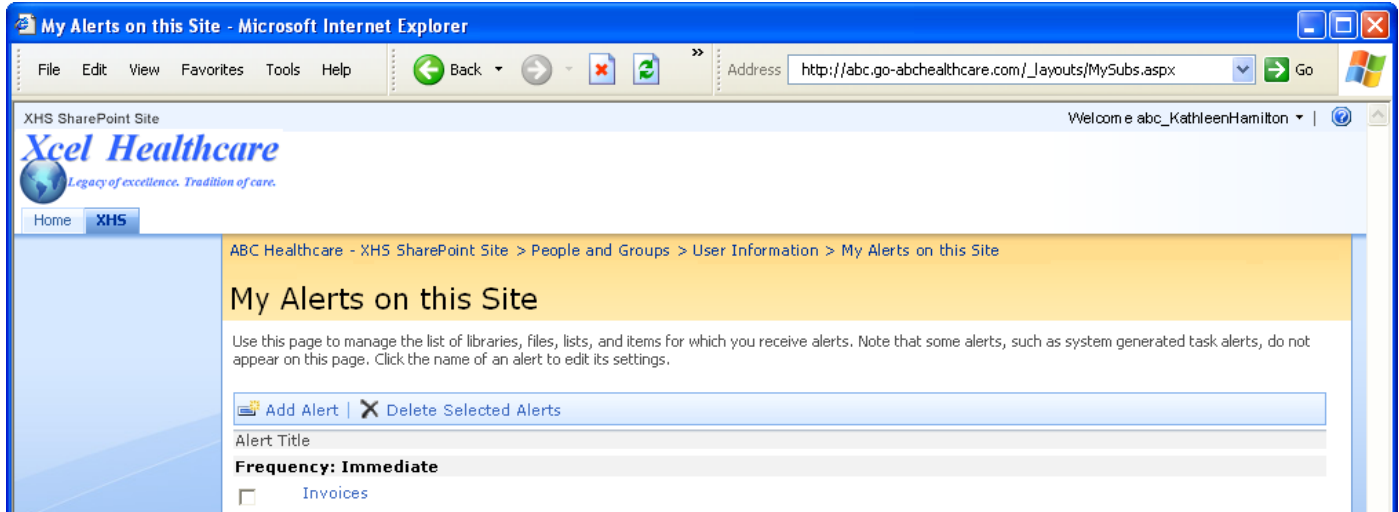
Time:

OK Cancel

- Click **OK** to save the new alert.

The alert that you just added appears on the My Alert page, showing the **Frequency** you selected.

Alerts are grouped on this page according to **Frequency: Immediate, Daily, or Weekly.**



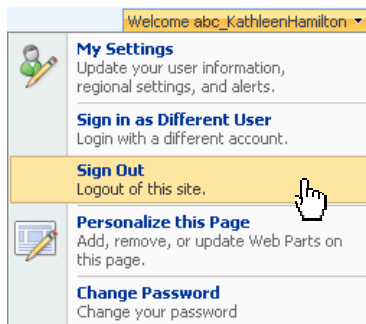
You also receive an e-mail confirmation that the new alert is created.

## Logging Out of the SharePoint Site

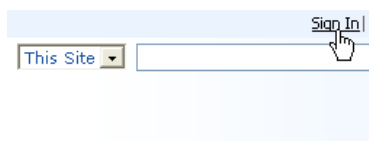
Whenever you exit your SharePoint Site, do not click the **Close** button. Instead, you should **Sign Out**.

Sign Out of the Sharepoint Site when you leave your work station, because your User Name and Password give you—and no other user—permissions to view site content and to perform actions.

- Click the **Welcome** arrow to open the drop-down menu, and select **Sign Out**.



The **Sign In** page with a Sign In link re-appears.



- Now, you can click the **Close** button  to exit your SharePoint site.

In this user guide, you learned how to:

- Access the ABC Healthcare SharePoint Site and **Sign In** with your assigned **User Name** and temporary **Password** in order to access the SharePoint Site for your own facility.
- Change your **Password**.
- View read-only information on the SharePoint site for your own facility, such as **Invoices** and other **Shared Documents** and **Resources**.
- View a **Calendar** and a **Contact** list.
- Edit your **Personal Settings**, such as your Email Address.
- Subscribe to **Email Alerts** for new information or updates, such as invoices.
- **Sign Out** of the SharePoint Site.