

University Information Technology Services

# Presidential Transition Taskforce

Office 365 OneDrive for Business Sharepoint Online

University Information Technology Services

Learning Technologies, Training & Audiovisual Outreach

# Introduction

This guide has been created to assist the Presidential Transition Taskforce with the following online Microsoft tools: Office 365, OneDrive for Business, and Sharepoint Online. The accompanying guides will provide a basic introduction and cover some key features of the tools.



University Information Technology Services

# Office 365 Getting Started

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# **University Information Technology Services**

# Office 365 Getting Started

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## Introduction

*Office 365* is a collection of applications and services that you can use to be productive across a variety of devices from just about anywhere. The KSU *Office 365* subscription plan includes access to Office applications and other productivity services available through your favorite browser on your PC or Mac.

# **Learning Objectives**

After completing the instructions in this booklet, you will be able to:

- Access your Office 365 account
- Understand and navigate the Office 365 interface
- Open documents within Office 365 online
- Open documents stored online with the desktop version of Office 2016
- Save your document
- Sign out of Office 365

# Logging in to Office 365

You will be able to access Office 365 both on-campus and off-campus. When logging into Office 365 while oncampus, your access is controlled by your log-in to the local machine. Once you sign into a desktop computer on-campus, Office 365 will recognize your credentials and log you in.

**Note:** Logging-in to Office 365 while off-campus follows the same steps as listed below.

To log into Office 365 while on-campus:

- 1. In your web browser of choice, navigate to portal.office.com.
- The Office 365 log-in screen will appear. In the user name field, type in your full KSU email and press Enter.



Figure 1 - On-Campus: Office 365 sign-in

3. Office 365 will redirect you to the KSU sign-in page.



Figure 2 - Click Sign In

4. You will be redirected to the Office 365 home page.

| <br>Office 36 | 5                 |            | STAT | ENNESAW<br>E UNIVERSITY | •     |          | Ļ | ø    | ?         | 100            | • |
|---------------|-------------------|------------|------|-------------------------|-------|----------|---|------|-----------|----------------|---|
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|               |                   | ning, Evan |      |                         |       |          |   |      |           | Other installs |   |
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| N             | N                 | s 🔛        | w    | PE                      | x∎    |          |   | F    |           | <u></u>        |   |
| OneNote       | Class<br>Notebook | Sway       | Word | PowerPoint              | Excel | OneDrive |   | orms |           | Planner        |   |
| VD            | D                 | y≑         |      |                         |       |          |   |      |           |                |   |
| Video         | Delve             | Yammer     |      |                         |       |          |   |      |           |                |   |
|               |                   |            |      |                         |       |          |   |      |           |                |   |
|               |                   |            |      |                         |       |          |   |      |           | 🛡 Feedback     |   |

Figure 3 - Office 365 Home Page

**Note:** While on-campus, access is controlled by the log-in credentials used to log-in to the local machine. If you wish to use your account in Office 365 while someone else is logged into the computer, you will need to use the browser's private/incognito browsing mode to access your Office 365 account while the other user is logged into the machine.

# **Office 365 Overview**

From the Office 365 home page, you can access the following:

- a. **App Launcher:** Access the Office web based applications from here at any time while on *Office* 365 (see Figure 4).
- b. Notifications/Settings/Help: Access notifications, Office 365 settings, and additional Office 365 help (see Figure 4).
- c. Account Information: Access your account information and sign out of Office 365 (see Figure 4).
- d. Install Office: Download desktop versions of the current Office suite of programs (see Figure 4).
- e. **Online Apps:** Access web-based versions of Microsoft Office programs and edit documents from your browser (see Figure 4).
- f. OneDrive: Access your KSU OneDrive for Business online storage account (see Figure 4).
- g. **Recent Documents/Folders:** Access recently accessed documents and folders directly from your *Office 365* home page (see Figure 4).

|          | Office 365  | KENNESAW<br>STATE UNIVERSITY    |            | b 🔺 🌣    | <b>?</b> E              | van R Atkin 👻       |
|----------|---|---------------------------------|------------|----------|-------------------------|---------------------|
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| e        | Use the online apps   |                                 |            |          |                         |                     |
|          | NE Class<br>OneNote Notebook Sway                             | Word PowerPoint                 | K<br>Excel | OneDrive | Forms                   |                     |
|          | Planner Video Delve   | <b>Y</b> ¢<br><sub>Yammer</sub> |            |          |                         |                     |
| 9        | Your recent online documents                                  |                                 |            |          | LAST                    | OPENED              |
|          | Evan @ Work<br>kennesawedu-my.sharepoint.com » Archive        |                                 |            |          | 41 minu                 | tes ago             |
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|          | Show more 🗸   |                                 |            |          |                         |                     |
|          | Your recent OneDrive folders<br>120 MB of 1 TB used           |                                 |            |          | LAST                    | OPENED              |
|          | Archive<br>kennesawedu-my.sharepoint.com                      |                                 |            |          | 41 minu                 | tes ago             |
|          | Documents<br>kennesawedu-my.sharepoint.com » » eatkin         | kennesaw_edu                    |            |          | 3 da                    | ays ago             |

Figure 4 - Office 365 Overview

### Using Web Versions of Microsoft Office

New with *Office 365* is the inclusion of Office Online, which allows access to Microsoft Office products such as Word, Excel, PowerPoint, and OneNote through your web browser. Although these web applications do not include the full functionality of their locally installed counterparts, you can use them on any computer connected to the internet, make edits to your work from within your web browser, and save your work to your OneDrive account.

**Note:** Although the following provides information on using the browser version of *Word*, many of the features or ways to access features are similar when using other browser versions of *Office 365*.

For example, to access the *Office 365* version of Microsoft Word:

- 1. Using your browser of choice, log in to Office 365 (see Logging in to Office 365).
- 2. From the Office 365 Home Page, click Word.



Figure 5 - Word Online

3. The Word Online will open in a new browser tab and display the backstage view.

| Word Online   |                    | Get Word for your device   | My account Evan Atkin   Sign out  |
|---|--------------------|--|---|
| Recent  | New in             |  |   |
| onedrive_for_business_gettingsta<br>sp.kennesaw.edu » uits » tolt » training » Shared D |                    | Latified   |   |
| Collaboration test.docx<br>kennesawedu-my.sharepoint.com » personal » eat               |                    | <ul> <li>By the same gives the same starts in the same start or and same starts and the same starts an</li></ul> | (and the lates up = 1 the late of the s the (and)<br>(and the lates) if and (and these allowed)<br>pointeened stillmence) |
| Created on Word 2016 mac.docx<br>kennesawedu-my.sharepoint.com » personal » eat         |                    |  | Audon Nan<br>Judok ng partificing administra at e cogine companies athers (   |
| office365_and_onedrive_for_busi<br>sp.kennesaw.edu » uits » tolt » training » Shared D  |                    |  |   |
|   | New blank document | General notes  | APA style paper   |

Figure 6 – Word Online Backstage View

**Note:** Although versatile, the *Office 365 Online Applications* only provide the basic tools for editing your work. For example, the online version of Word provides the basic tools in the ribbon to edit your work.

### **Opening your Word Online document in Word**

The following explains how to open your *Word Online* document in your desktop version of Microsoft Word:

1. Click on **Edit in Word** to open the document on your computer in the current version of Microsoft Word.

|                | Word Online | Evan R Atkin   | Document3 - Saving                          |        | 🤱 Share                      | Evan R Atkin |
|----------------|-------------|--|---|--------|------------------------------|--------------|
| FILE           | HOME INSERT | PAGE LAYOUT REVIEW VIEW Q  | Tell me what you want to do EDIT IN WC      | RD     |                              |              |
| <b>\$</b><br>? | Paste       | Calibri (Body) $-$ 11 $-$ A <sup>*</sup> A <sup>*</sup> $\stackrel{\bullet}{\diamond}$<br>B I $\underline{U}$ also $\mathbf{x}_2$ $\mathbf{x}^2$ $\stackrel{\bullet}{\underline{a}}$ $\stackrel{\bullet}{\underline{A}}$ $\stackrel{\bullet}{\underline{A}}$ | E · E · E · F · AaBbCc<br>■ = = = ↓ · · · · |        | AaBbCc<br>Heading 3 + Bac Re |              |
| Undo           | Clipboard   | Font   | Paragraph 🛛                                 | Styles | r⊊ Edit                      | ing ^        |



**Note:** The *Edit in* feature is available in all of the online versions of Microsoft Office with an accompanying desktop version.

2. A window will appear confirming if you wish to open this file in Microsoft Word. Click Yes to continue.



Figure 8 - Do You Want To Open This File?

3. The document will open in Microsoft Word and you can continue editing your work.

For more information on utilizing the desktop version of the *Microsoft Office* programs, visit the UITS Document Center at <u>uits.kennesaw.edu/cdoc</u> and search for your preferred *Microsoft Office 2016* application (e.g. Word, Excel, PowerPoint, or OneNote).

### **Saving your Document**

There is no save document button in the online versions of *Microsoft Office. Word Online* (as well as the other online versions of Microsoft Office) automatically saves the changes to your document as you go along to your *OneDrive for Business* account. If you wish to save multiple versions of your document, you can change the title of your document.

# Sign out of Office 365

The following explains how to sign out of *Office 365*:

1. In the *upper-right* corner of your screen, click on your **name**.

| <br>Office 365 | KENNESAW<br>STATE UNIVERSITY  | <b>4</b> 1 |          | KENNESAW<br>STATE UNIVERSITY |             |  |  |  |
|----------------|-------------------------------|------------|----------|------------------------------|-------------|--|--|--|
|                |                               |            | <u>+</u> | Install                      | Office 2016 |  |  |  |
|                | Figure 9 - Click on your Name |            |          |                              |             |  |  |  |

2. A dropdown menu will appear. Click on Sign out.

| <br>Office 365 | KENNESAW<br>STATE UNIVERSITY |                           | چ ک   | ? | Evan R Atkin 👻 |
|----------------|------------------------------|---------------------------|-------|---|----------------|
|                |                              | Evan R Atl<br>eatkin@kenr |       |   |                |
|                |                              | About m                   | ne    |   |                |
|                |                              | View acc                  | count |   |                |
| Good morning,  | Evan                         | Sign out                  | t     |   |                |
|                |                              |                           |       |   |                |

Figure 10 - Sign Out

3. You will be signed out of *Office 365*.

# **Additional Help**

For additional support, please contact the KSU Service Desk:

### KSU Service Desk for Faculty & Staff

- Phone: 470-578-6999
- Email: <u>service@kennesaw.edu</u>
- Website: <u>http://uits.kennesaw.edu</u>



University Information Technology Services

# KSU OneDrive for Business

# **Getting Started**

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# KSU OneDrive for Business Getting Started

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## Introduction

*OneDrive for Business* is Microsoft's version of cloud storage where you can store, edit, sync, and share your files with others. *OneDrive for Business* is integrated with Office 365, enabling you to update and share your files from anywhere and work on Office documents with others at the same time.

KSU's agreement with Microsoft currently allows 1 TB of space with a 4 GB upload size while on-campus.

For more information on Office 365, please refer to the *Office 365: Getting Started* section of your booklet.

## **Learning Objectives**

After completing the instructions in this booklet, you will be able to:

- Access your Kennesaw State University (KSU) OneDrive for Business account
- Manage your files in your OneDrive for Business account
- Upload files and folders to your OneDrive for Business account
- Share and manage files with other members within your organization

# Access your OneDrive for Business Account through Office 365

- 1. In your web browser of choice, navigate to <u>portal.office.com</u>.
- 2. The *Office 365* log-in screen will appear. In the *user name* field, type in your full **KSU email** and press **Enter**.



Figure 1 - On-Campus: Office 365 sign-in

3. Office 365 will redirect you to the KSU sign-in page.



Figure 2 - Click Sign In

4. If this is your first time signing-in on the computer or browser, then you will be prompted to enter your *username* and *password*. Enter your **log-in** credentials and click **OK**. Otherwise, skip to step 5.

| Authenticat | tion | Required  | × |
|-------------|------|---|---|
| 0           |      | Enter username and password for https://ksufed.kennesaw.ed  | u |
| User Nam    | ne:  | and a line of a second s |   |
| Passwor     | rd:  | •••••   |   |
|             |      | OK Cancel   |   |

Figure 3 - Authentication Required

5. The *Office 365* home page will open. Click **OneDrive**.

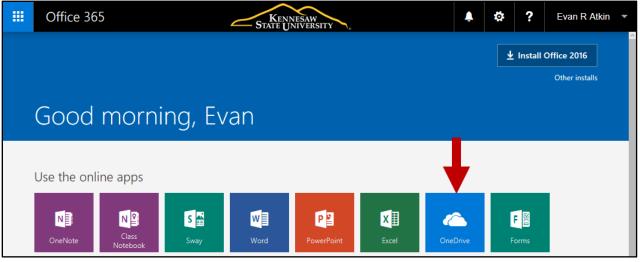


Figure 4 - OneDrive Icon

6. OneDrive for Business will open and display your documents.

| Office 365                 | OneDrive State   | ENNESAW<br>UNIVERSITY | <b>≜</b> ‡           | ? Evan R Atkin -                    |
|----------------------------|--|-----------------------|----------------------|-------------------------------------|
| ✓ Search                   | $+$ New $\lor$ $\overline{\uparrow}$ Upload $\lor$ $\bigcirc$ Sync |                       |                      | ↓= Sort ∨ ⊞ (i)                     |
| Evan R Atkin               | Files  |                       |                      | ~                                   |
| Files                      | ✓ ↑ Name   | Modified Mo           | odified By File Size | Sharing                             |
| Recent<br>Shared with me   | Archive  | March 28, 2015 Eva    | an R Atkin           | A Only you                          |
| Discover                   | Group Project  | May 9, 2015 Eva       | an R Atkin           | я <sup>я</sup> Kyle M Williams and  |
| Recycle bin                | Testing Scripts  | November 16 Eva       | an R Atkin           | A Only you                          |
|                            | 👔 A Short PowerPoint.pptx  | November 16 Eva       | an R Atkin 231 KB    | x <sup>R</sup> Evan Atkin and 3 mor |
|                            | Book.xlsx  | November 17 Eva       | an R Atkin 8.54 KB   | я <sup>q</sup> Randall Dean         |
|                            | Collaboration test.docx  | November 16 Ra        | ndall Dean 27.1 KB   | ศ <sup>ุ</sup> Randall Dean and 1   |
|                            | Created on Word 2016 mac.doc                                       | x November 17 Eva     | an R Atkin 25.0 KB   | я <sup>9</sup> Shared               |
| Get the OneDrive apps      | D2L Brightspace - Setting up a I                                   | Dr September 25, Eva  | an R Atkin 8.46 MB   | A Only you                          |
| Return to classic OneDrive | D2L Brightspace Dropbox.cptx                                       | September 25, Eva     | an R Atkin 17.0 MB   | A Only you                          |

Figure 5 - Documents in OneDrive

**Note:** While on-campus, access is controlled by the log-in credentials used to log-in to the local machine. If you wish to use your account in Office 365 while someone else is logged into the computer, you will need to use the browser's private/incognito browsing mode to access your Office 365 account while the other user is logged into the machine.

# Managing your Files in OneDrive for Business

You can use your *OneDrive for Business* account to upload, store, manage, and access your files. You can also share files with other users and see what documents have been shared by your collegues.

### **Upload Files to OneDrive**

You can upload files, or an entire folder containing all of your files, to your OneDrive for Business account. The easiest way to upload a file is to simply drag the file into your file list on OneDrive for Business. The will automatically be uploaded to your account.

|           | III Office 365           | OneDrive State U   | INESAW<br>JNIVERSITY | پ چ                   | ? Evan R Atkin 👻                      |
|-----------|--------------------------|--|----------------------|-----------------------|---------------------------------------|
|           | ✓ Search                 | $+$ New $\lor$ $\ ar{\uparrow}$ Upload $\lor$ $\ ar{G}$ Sync |                      |                       | ↓≂ Sort ∨ ⊞ i                         |
|           | Evan R Atkin<br>Files    | Files  |                      |                       | Â                                     |
|           |                          | ✓ ↑ Name   | Modified M           | lodified By File Size | Sharing                               |
|           | Recent<br>Shared with me | Archive  | March 28, 2015 Ev    | van R Atkin           | 台 Only you                            |
|           | Discover                 | Group Project  | May 9, 2015 Ev       | van R Atkin           | ศ <sup>ุ</sup> Kyle M Williams and 1. |
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| Documents |                          | Book.xlsx  | November 17 Ev       | van R Atkin 8.54 KB   | <sup>ନ୍ୟ</sup> Randall Dean           |
|           |                          | Collaboration test.docx                                      | November 16 Ra       | andall Dean 27.1 KB   | ది Randall Dean and 1 m.              |

Figure 6 – Dragging a Folder from the Desktop into OneDrive for Business

To upload an entire folder to your OneDrive for Business account:

- 1. Click Upload (see Figure 7).
- 2. From the drop-down, select Folder (to upload a single folder with multiple files inside) (see Figure 7).

|        | Office 365 | OneDrive       | (1  | Kenni<br>– State Un | ESAW<br>IVERSITY |              | <u>۽</u>  | ð 1  |            | Evan R.  | Atkin  | • |
|--------|------------|----------------|---|---------------------|------------------|--------------|-----------|------|------------|----------|--------|---|
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| Evan R | Atkin      | Files          | Files   | 2                   |                  |              |           |      |            |          |        | ^ |
| Files  |            | ✓ ↑            | Folder  |                     | Modified         | Modified By  | File Size | c    | haring     |          |        |   |
| Recer  | nt         |                |   |                     |                  | -            | The Size  |      | -          |          |        |   |
| Share  | ed with me | A              | rchive  |                     | March 28, 2015   | Evan R Atkin |           | Ċ    | 3 Only y   | ou       |        |   |
| Disco  | ver        | R G            | roup Project                                  |                     | May 9, 2015      | Evan R Atkin |           | R    | ំ Kyle M   | Williams | and 1. |   |
| Recyc  | ele bin    | E Te           | esting Scripts                                |                     | November 16      | Evan R Atkin |           | Ê    | 🗄 Only y   | ou       |        |   |

Figure 7 - Upload to OneDrive

3. The *File Explorer* will appear. Select the **folder** from your computer to upload, and click **Select Folder**.

| Select Folder  |   |                     | ×           |
|--|---|---------------------|-------------|
| $\leftarrow$ $\rightarrow$ $\checkmark$ $\Uparrow$ Inis PC $\Rightarrow$ Desktop $\Rightarrow$ |   | ✓ ひ Search Desktop  | م           |
| Organize 🔻 New folder  |   |                     |             |
|  | Name                                    | Date                | Туре        |
| > 📌 Quick access   | attachments                             | 1/12/2017 3:40 PM   | File folder |
| > 🐉 Dropbox  | Important Documents                     | 11/29/2016 3:46 PM  | File folder |
| 🗸 🚍 This PC  | New folder                              | 1/4/2017 11:58 AM   | File folder |
| > Desktop  | Office 365                              | 12/8/2016 2:54 PM   | File folder |
|  | Presidents Committee documentation      | 1/11/2017 1:14 PM   | File folder |
| > 🟥 Documents  | Docs                                    | 11/11/2016 10:32 AM | Shortcut    |
| > 🕂 Downloads  | 😿 OwlDrive(eatkin) (U) - Shortcut       | 11/11/2016 10:32 AM | Shortcut    |
| > 🁌 Music  | 📅 Scan Folder(eatkin) (V) - Shortcut    | 11/11/2016 10:32 AM | Shortcut    |
| > 💽 Pictures   | 📅 training (inas1shared) (J) - Shortcut | 11/11/2016 10:31 AM | Shortcut    |
| > 📕 Videos   |   |                     |             |
| > 🏪 Windows (C:)   |   |                     |             |
| > 👝 My Passport (D:)   | <                                       |                     | 3           |
| Folder: Important Documents  |   |                     |             |
|  |   | Select Folder       | Cancel      |

Figure 8 - File Upload

4. The folder, along with all files/folders contained inside it will be uploaded to your *OneDrive for Business* account.

| Office 365      | OneDrive   | Kennesaw<br>TATE UNIVERSITY |              | Ļ         |
|-----------------|--|-----------------------------|--------------|-----------|
| ✓ Search        | + New $\lor$ $\bar{\uparrow}$ Upload $\lor$ $\bar{G}$ Sync |                             |              |           |
| Evan R Atkin    | Files  |                             |              |           |
| Files<br>Recent | ✓ î Name   | Modified                    | Modified By  | File Size |
| Shared with me  | Access   | September 20, 2016          | Evan R Atkin |           |
| Discover        | Important Documents  | A few seconds ago           | Evan R Atkin |           |
| Recycle bin     | LinktoKSUHomePage.url                                      | November 16, 2016           | Evan R Atkin | 47 bytes  |
|                 | Microsoft Exchange Meeting Note                            | December 7, 2016            | Evan R Atkin | 121 KB    |

Figure 9 – Folder Uploaded Successfully

### **Opening Documents from OneDrive for Business**

OneDrive for Business allows you to access your Microsoft Office files and edit them online with the *Microsoft Office Online* set of tools, or open the file in the desktop vesion of Microsoft Office.

The following example will demonstrate how to open a Word document stored in OneDrive with Word Online, then continue editing the document in the desktop version of Word:

| III Office 365           | OneDrive   | Kennesaw<br>Tate University |              | ¢         |
|--------------------------|--|-----------------------------|--------------|-----------|
| ✓ Search                 | $+$ New $\lor$ $\overline{\uparrow}$ Upload $\lor$ $\bigcirc$ Sync |                             |              |           |
| Evan R Atkin             | Files  |                             |              |           |
| Files                    | ✓ ↑ Name   | Modified                    | Modified By  | File Size |
| Recent<br>Shared with me | Access   | September 20, 2016          | Evan R Atkin |           |
| Discover                 | Biography.docx   | A few seconds ago           | Evan R Atkin | 10.6 KB   |
| Recycle bin              | LinktoKSUHomePage.url  | November 16, 2016           | Evan R Atkin | 47 bytes  |
|                          | ाली Microsoft Exchange Meeting Note                                | December 7, 2016            | Evan R Atkin | 121 KB    |

1. Click the **document** you wish to open.

Figure 10 - Select a Document to Open

2. The document will open in the version of *Office Online* that is suitable to the file (e.g. Word documents will open in *Word Online, etc*). You can preview the document, or choose to edit the document within your browser. Click **Edit Document** (see Figure 11).

|        | Word Online |  | Evan R   | Atkin |
|--------|-------------|--|----------|-------|
| Evan R | Atkin       | Biography 📝 Edit Document 🗸 🖶 Print 🔹 Share 💭  | Comments |       |
|        | ]<br>]      | Hi, my name is Michaël Burns, and I am a senior at Dalton State College studying to get my<br>Scology major and Business minor. I was born and raised in Phoenix and have three brothers. I<br>ive in an off-campus apartment with my pet dog called Mr. Fluffy, and I work at the campus<br>greenhouse and garden. All of the produce at the school's organic cafe comes from the<br>greenhouse and garden. |          |       |

Figure 11 - Edit Document

- 3. A drop down menu will appear with the following options:
  - a. **Edit in Word**: If you have Microsoft Office installed on your computer, then the file will open with the corresponding Office program (see Figure 12).
  - b. Edit in Browser: You can select to edit the document in *Word Online*, or open the document in your desktop version of *Microsoft Word* (see Figure 12).

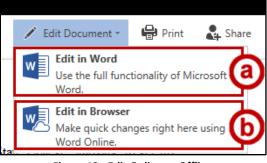


Figure 12 - Edit Online or Offline

4. Click your name to return to your OneDrive account (see Figure 13).

|        | Word Online | ,   |         |       | Evan R   | Atkin |
|--------|-------------|---|---------|-------|----------|-------|
| Evan R | Atkin       | 🖍 Edit Document 🗸   | 🖶 Print | Share | Comments |       |
|        |             |   |         |       |          | î     |
|        |             |   |         |       |          |       |
|        |             | chaël Burns, and I am a senior at Dalton<br>Business minor. I was born and raised i |         |       |          |       |

Figure 13 - Click Name to Return to OwlDrive

- 5. You will be returned to your *OneDrive* account. You can also open a document from within OneDrive for Business by:
  - a. Clicking the space to the left of the document to select it (see Figure 14).
  - b. Clicking **Open** to reveal a dropdown with more options (see Figure 14).

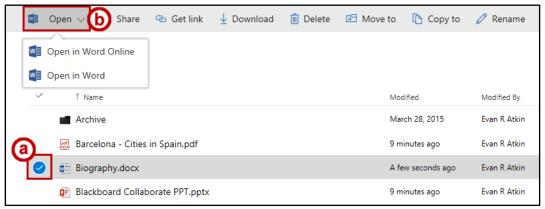


Figure 14 – Opening Within OneDrive for Business

6. A window will appear asking if you want to open the file. Click Yes.

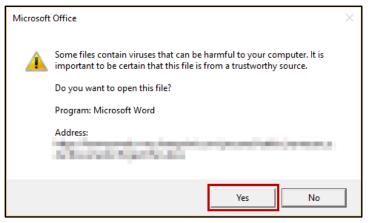


Figure 15 - Open File

7. The document will open in your desktop version of *Microsoft Office*.

#### **Creating a New File within OneDrive for Business**

In addition to creating a file outside of *OneDrive for Business*, you can also create a new file from within the *OneDrive for Business* account. For example, you could choose to create a new document from within *OneDrive for Business*:

1. In the *Menu Bar* at the top of the page, click **New**.

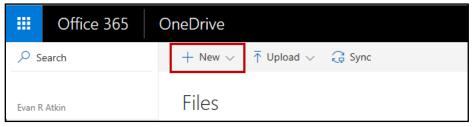


Figure 16 - New

2. A list will appear displaying options to create a new folder, web link, or various types of Office documents. For example, click **Word document**.

| $+$ New $\vee$ | $\overline{\uparrow}$ Upload $\lor$ | G Sync |
|----------------|-------------------------------------|--------|
| - Folder       |                                     |        |
| Word do        | ocument                             |        |
| Excel wo       | orkbook                             |        |
| PowerPo        | oint presentation                   |        |
| OneNot         | e notebook                          |        |
| Excel su       | rvey                                |        |
| 🕀 Link         |                                     |        |

Figure 17 - Create a New Word Document

3. *Word Online* will open with a blank document ready for you to edit.

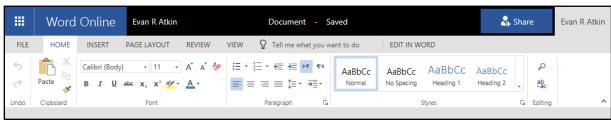


Figure 18 - New Document Created in Word Online

4. To return to your *OneDrive* account, click **your name** next to *Word Online*.

|        | Word      | Online                         | Evan R Atkin  |        |      | Document                 | - Sa     | aved             |                      |                     | 2+                  | Sha | re      | Evan R Atkin |
|--------|-----------|--------------------------------|---|--------|------|--------------------------|----------|------------------|----------------------|---------------------|---------------------|-----|---------|--------------|
| FILE   | HOME      | INSERT                         | PAGE LAYOUT   | REVIEW | VIEW | Q Tell me what           | t you wa | ant to do        | EDIT IN W            | ORD                 |                     |     |         |              |
| 5<br>C | Paste     | Calibri (Body)<br>B I <u>U</u> | $\begin{array}{c c} \bullet & 11 \\ \bullet $ | A a 🏷  |      | •• ≣• ≣• =<br>• •≣\$ ≣ ≡ | ¶⁴       | AaBbCc<br>Normal | AaBbCc<br>No Spacing | AaBbCc<br>Heading 1 | AaBbCc<br>Heading 2 | -   | ې<br>ab |              |
| Undo   | Clipboard |                                | Font  |        |      | Paragraph                | G.       |                  |                      | Styles              |                     | G.  | Editing | ^            |

Figure 19 - Return to your OneDrive Account

### Creating a New Folder within OneDrive for Business

The following explains how to create a new folder within OneDrive for Business:

1. In the *Menu Bar* at the top of the page, click **New**.

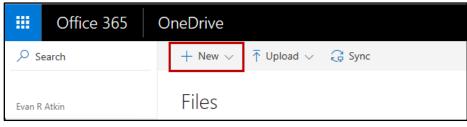


Figure 20 – New

2. From the drop-down list, click Folder.

| + New $\lor$ $\overline{\uparrow}$ Upload $\lor$ | G Sync |
|--|--------|
|  |        |
| 🗋 Folder   |        |
| Word document                                    |        |
| Excel workbook                                   |        |
| Per PowerPoint presentation                      |        |
| OneNote notebook                                 |        |
| Excel survey                                     |        |
| 🕀 Link   |        |

Figure 21 - Create a New Word Document

- 2. The *Folder* window will appear. In the *Name* field, type the **name** for your folder (see Figure 22).
- 3. Click Create (see Figure 22).

| Folder          | ×        |
|-----------------|----------|
| Project Rollout | 3        |
|                 | 4 Create |

Figure 22 – Creating a New Folder

4. The folder will be created.

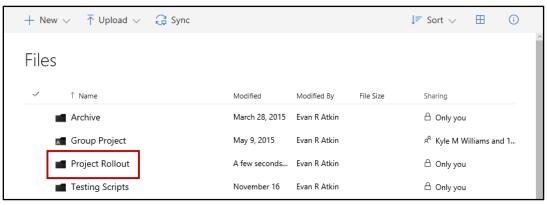


Figure 23 - Invite People

### **Deleting Files and Folders**

You can delete files and folders no longer needed from your *OneDrive for Business* account. These file will then be moved to the recycling bin of your *OneDrive for Business* account (see Restoring Deleted Files and Folders). The following will explain how to delete files and folders:

- 1. Click the **space** next to the file(s) to select (see Figure 24).
- 2. Click **Delete** (see Figure 24).

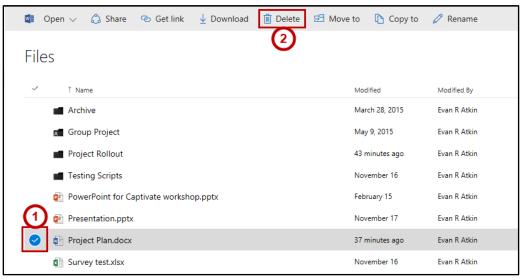


Figure 24 - Select File for Deletion

3. The file(s) will be deleted and moved to the Recycling bin of your OneDrive for Business account.

### **Restoring Deleted Files and Folders**

Files and folders that have been deleted will be moved into the *recycling bin* in your *OneDrive for Business* account. From here, you can restore files/folders, permanently delete them, or empty your recycling bin all at once (permanently deleting all files). The following example will show how to restore a deleted file:

1. Click the **Recycle bin** link.

| III Office 365           | OneDrive State UNIT  | SAW<br>VERSITY |              |
|--------------------------|--|----------------|--------------|
| ✓ Search                 | $+$ New $\checkmark$ $\overline{\uparrow}$ Upload $\checkmark$ $ $ |                |              |
| Evan R Atkin             | Files  |                |              |
| Files                    | ✓ ↑ Name   | Modified       | Modified By  |
| Recent<br>Shared with me | Archive  | March 28, 2015 | Evan R Atkin |
| Discover                 | Group Project  | May 9, 2015    | Evan R Atkin |
| Recycle bin              | Testing Scripts  | November 16    | Evan R Atkin |
|                          | 👔 A Short PowerPoint.pptx  | November 16    | Evan R Atkin |

Figure 25 - Click Recycling Bin

- 2. The *Recycling Bin* will open and display all files currently in the recycling bin, where the file came from, who deleted the file and when, and who the original author was (see Figure 26).
- 3. Click the **checkbox(s)** next to the file(s) you wish to restore (see Figure 26).
- 4. Click **Restore** (see Figure 26).

| Office 365               | OneDrive                        |                                |              | Kennesaw<br>State University           |
|--------------------------|---------------------------------|--------------------------------|--------------|--|
| ✓ Search                 | 🗊 Delete 🕤 Restore 4            |                                |              |  |
| Evan R Atkin<br>Files    | Recycle bin                     |                                |              |  |
|                          | V Name                          | ↓ Date deleted Deleted by      | Created by   | Original location                      |
| Recent<br>Shared with me | Sarcelona - Cities in Spain.pdf | 12/1/2016 1:29 PM Evan R Atkin | Evan R Atkin | personal/eatkin_kennesaw_edu/Documents |
| Discover                 | 3 Book.xlsx                     | 12/1/2016 1:29 PM Evan R Atkin | Evan R Atkin | personal/eatkin_kennesaw_edu/Documents |
| Recycle bin              | Collaboration test.docx         | 12/1/2016 1:29 PM Evan R Atkin | Evan R Atkin | personal/eatkin_kennesaw_edu/Documents |

Figure 26 - Select Files for Restoration

5. The file will be restored and returned to the folder it was last deleted from.

### **Sharing Files and Folders with Others**

You can share files and folders within your *OneDrive for Business* account with others to easily collaborate on projects; regardless of if they are members of your organization. *OneDrive for Business* provides the option for emailing access links or generating a link for you to use, all while allowing you to choose if others will have editing or viewing access. The following shows how to invite people to edit a file:

Note: When sharing a folder, you can choose to have all files available, even items with unique permissions.

- 1. Click to the left of the document(s) you want to share (see Figure 27).
- 2. Click Share (see Figure 27).

|      | Open 🗸 🖒 Share 👁 Get link 🛓        | Download 📋 De | elete ···    |           | 1 selected $\times$ (i)     |
|------|------------------------------------|---------------|--------------|-----------|-----------------------------|
| L:1  | (2)                                |               |              |           |                             |
| File | 25                                 |               |              |           |                             |
| ~    | ↑ Name                             | Modified      | Modified By  | File Size | Sharing                     |
|      | Project Rollout                    | 10 hours ago  | Evan R Atkin |           | 🖰 Only you                  |
|      | Testing Scripts                    | November 16   | Evan R Atkin |           | 읍 Only you                  |
|      | 👔 PowerPoint for Captivate worksho | February 15   | Evan R Atkin | 56.2 KB   | 🖰 Only you                  |
|      | 😰 Presentation.pptx                | November 17   | Evan R Atkin | 145 KB    | <sup>ନ୍ୟ</sup> Randall Dean |
|      | Froject Plan.docx                  | 10 hours ago  | Evan R Atkin | 14.5 KB   | 🔒 Only you                  |

Figure 27 – Sharing Documents

Note: You can also access this screen by clicking the Share button while viewing or editing a document

|          | Word Online |  |          |         |                   |         |       | Evan R   | t Atkin |
|----------|-------------|--|----------|---------|-------------------|---------|-------|----------|---------|
| Evan R / | Atkin       |  | Tongue T | wisters | 🖌 Edit Document 🕶 | 🖨 Print | Share | Comments |         |
|          |             |  |          |         |                   |         |       |          |         |

Share button while viewing a document

|      | Word       | Online              | Evan R Atkin   |         | Tongue Twisters              |          |                      | 🎝 Share   | Evan R Atkin      |
|------|------------|---------------------|----------------|---------|------------------------------|----------|----------------------|-----------|-------------------|
| FILE | HOME       | INSERT              | PAGE LAYOUT    | REVIEW  | VIEW Tell me what you want t | o do 🛛 🍷 | OPEN IN WORD         |           |                   |
| 5    | <b>6</b> X | Calibri (Body)      | - 11 -         | A* A* 🖗 | ;≡ • ;≡ • ∉≡ <b>+</b> ≡      | AaBbCc   | AaBbCc AaBbC         | A: BbCc   | <i>a</i> <b>n</b> |
| Ç    | Paste 📴    | в <u>г</u> <u>U</u> | ab∈ X₂ X² a½ - | A       | ≡≡≡≡‡•••                     | Normal   | No Spacing Heading 1 | Hending 2 | ab<br>vac         |
| Undo | Clipboard  |                     | Font           |         | Paragraph                    |          | Styles               |           | Editing ^         |

Share button while editing a document in Word Online Figure 28 - Accessing Share Button

- 3. The *Share* window will open and will display the *Invite People* tab with the following:
  - a. Enter the **email addresses** of the individuals you wish to share with (see Figure 29).
  - b. From the drop-down, select the **permissions** to grant (edit or view) (see Figure 29).
  - c. Type a **message** to be sent to the receipients of the share (optional) (see Figure 29).
  - d. Set if users will need to sign-in to Office 365, and if you wish to send them an email notification about the share (see Figure 29).
  - e. Click **Share** to share the document(s) (see Figure 29).

| Share 'Projec      | t Plan'   | ×          |
|--------------------|---|------------|
| 🔒 Only shared with | you (a)   | Ь          |
| Invite people      | 🚳 Randall Dean 🛛 🚫 Kyle M Williams 🗡                                      | Can edit 🗸 |
| Get a link         |   |            |
| Shared with        | Please review and provide your feedback and suggestion<br>Thanks!         | s.         |
| C                  | <ul> <li>☑ Require sign-in</li> <li>☑ Send an email invitation</li> </ul> |            |
|                    | <b>e</b>  | Share      |

Figure 29 – Inviting People to a Share

4. An email notifying recipients about the file share will be sent out. The email will contain a link that recipients can click in order to access the share file.

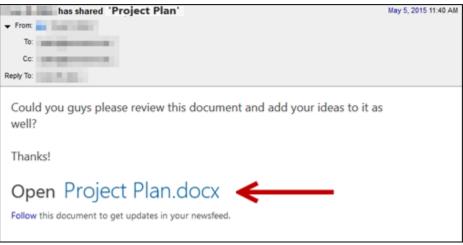


Figure 30 – Example of Share Notification Email

- 5. Clicking on the link will redirect you to *OneDrive for Business*. After signing in to their account, recipients will be able to view and/or edit the shared document (based on the access granted when the share was initially created).
- 6. Files and folders that have been shared with other users will show how many people have been granted from *OneDrive for Business*.

| ~ | 1 Name                            | Modified     | Modified By  | File Size | Sharing                              |
|---|-----------------------------------|--------------|--------------|-----------|--------------------------------------|
|   | Group Project                     | May 9, 2015  | Evan R Atkin |           | я <sup>я</sup> Kyle M Williams and 1 |
|   | Project Rollout                   | 11 hours ago | Evan R Atkin |           | 읍 Only you                           |
|   | 📳 Evan @ OneDrive - Kennesaw Stat | September 22 | Evan R Atkin |           | <sup>R</sup> Randall Dean and 2 m    |
|   | UinktoKSUHomePage.url             | November 16  | Evan R Atkin | 47 bytes  | 읍 Only you                           |
|   | Office 365 Word Test.docx         | November 15  | Evan R Atkin | 10.7 KB   | <sup>ନ୍ୟ</sup> Evan Atkin and 1 more |
|   | Presentation.pptx                 | November 17  | Evan R Atkin | 145 KB    | <sup>ନ୍ୟ</sup> Randall Dean          |
|   | Project Plan.docx                 | 11 hours ago | Evan R Atkin | 14.5 KB   | ศ <sup>ุ</sup> Kyle M Williams and 3 |
|   | Tongue Twisters.docx              | November 21  | Evan R Atkin | 10.7 KB   | 台 Only you                           |

Figure 31 - Share Status of Files and Folders

### Viewing Files that have been Shared with you

Once files have been shared with you from other individuals, you can access these files from within your *OneDrive for Business* account. To view what files have been shared with you:

1. Click **Shared with me** from the menu to the left.

| III Office 365           | OneDrive Ken<br>State U                                      | NNESAW<br>JNIVERSITY        |
|--------------------------|--|-----------------------------|
| 🔎 Search                 | $+$ New $\lor$ $\ ar{\uparrow}$ Upload $\lor$ $\ ar{G}$ Sync |                             |
| Evan R Atkin             | Files  |                             |
| Files                    | ✓ ↑ Name   | Modified Modified By        |
| Recent<br>Shared with me | Archive  | March 28, 2015 Evan R Atkin |
| Discover                 | Group Project  | May 9, 2015 Evan R Atkin    |
| Recycle bin              | Project Rollout  | 11 hours ago Evan R Atkin   |

Figure 32 - Access Files Shared with you

2. A list of all the shares from other individuals will be displayed.

| Evan R Atkin               | Files           |                |              |
|----------------------------|-----------------|----------------|--------------|
| Files                      | ✓ Î Name        | Modified       | Modified By  |
| Recent                     | Archive         | March 28, 2015 | Evan R Atkin |
| Shared with me<br>Discover | Group Project   | May 9, 2015    | Evan R Atkin |
| Recycle bin                | Project Rollout | 11 hours ago   | Evan R Atkin |

Figure 33 - Shared with Me

### Sharing a File via a Link

You can create an anonymous guest link that can be sent in an email, posted online, or shared through social media. Users can use this link to either view or edit the file/document depending on the link generated. For example, to create a guest link with view only access:

- 1. Click to the **left** of the document(s) you want to generate a guest link for (see Figure 34).
- 2. Click Get Link (see Figure 34).

| <b>1</b>     | Open 🗸 🖧 Share 🛛 Get link          | Download 📋 🛙 | Delete ····  |           | 1 selected 🗙 🤅              |
|--------------|------------------------------------|--------------|--------------|-----------|-----------------------------|
| File         | (2)                                |              |              |           |                             |
|              |                                    |              |              |           |                             |
| $\checkmark$ | ↑ Name                             | Modified     | Modified By  | File Size | Sharing                     |
|              | Project Rollout                    | 10 hours ago | Evan R Atkin |           | 🖰 Only you                  |
|              | Testing Scripts                    | November 16  | Evan R Atkin |           | 🖰 Only you                  |
|              | 👔 PowerPoint for Captivate worksho | February 15  | Evan R Atkin | 56.2 KB   | A Only you                  |
| $\bigcirc$   | Presentation.pptx                  | November 17  | Evan R Atkin | 145 KB    | ନ <sup>ୟ</sup> Randall Dean |
|              | Project Plan.docx                  | 10 hours ago | Evan R Atkin | 14.5 KB   | 🖞 Only you                  |

Figure 34 – Generate a Guest Link

- 3. The *Get a Link* tab will open. Select **View Link** from the options. Additional options include: (see Figure 35).
  - a. Restricted Link Only specific people will be able to open this link (see Figure 35).
  - b. **View Link KSU** Only people with a KSU netid and password will be able to view (see Figure 35).
  - c. Edit Link KSU Only people with a KSU NetID and password will be able to edit (see Figure 35).
  - d. View Link Anyone with the link will be able to view. (see Figure 35).
  - e. Edit Link Anyone with the link will be able to edit (see Figure 35).
- 4. Click Create to generate the link (see Figure 35).

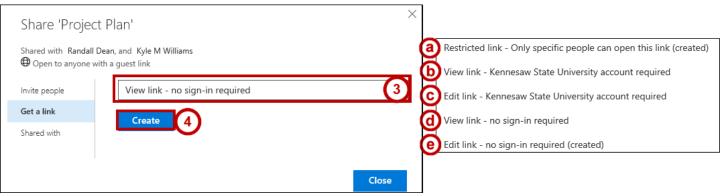


Figure 35 - Guest Link Options

- 5. The guest link will be created and displayed. You can copy and paste this link into an email. If you need the link again, it will remain in the *Get a Link* tab for this file (see Figure 36).
- 6. If you wish to deactivate the link, click **Remove** (see Figure 36).
- 7. You can set the link to expire after a set amount of days by clicking **Set Expiration** (see Figure 36).
- 8. Once finished, click **Close** (see Figure 36).

| Share 'Proje                      | t Plan'  | ×      |
|-----------------------------------|--|--------|
| Shared with Kyle M Open to anyone | Williams, and Randall Dean<br>with a guest link        |        |
| Invite people                     | View link - no sign-in required                        | $\sim$ |
| Get a link                        | 5 https://kennesawedu-my.sharepoint.com/personal/eatki | REMOVE |
| Shared with                       | SET EXPIRATION ~                                       | 6      |
|                                   |  | Close  |
|                                   |  |        |

Figure 36 - Guest Link Generated

### **Editing an Existing Share**

Once you have created a share with another user, you can alter the permissions they have to the file/folder, remove individuals from a share, or remove everyone at once from the share.

- 1. Click to the **left** of the document(s) you want to alter the permissions on (see Figure 37).
- 2. Click Get Link (see Figure 37).

| <b>1</b>   | Open 🗸 🖒 Share 👁 Get link 🛓        | Download 📋 D | elete ···    |           | 1 selected $\times$ ()       |
|------------|------------------------------------|--------------|--------------|-----------|------------------------------|
| File       | 22                                 |              |              |           |                              |
| ~          | 1 Name                             | Modified     | Modified By  | File Size | Sharing                      |
|            | Project Rollout                    | 10 hours ago | Evan R Atkin |           | 台 Only you                   |
|            | Testing Scripts                    | November 16  | Evan R Atkin |           | 台 Only you                   |
| _          | 😰 PowerPoint for Captivate worksho | February 15  | Evan R Atkin | 56.2 KB   | 台 Only you                   |
|            | Presentation.pptx                  | November 17  | Evan R Atkin | 145 KB    | ศ <sup>ุณ</sup> Randall Dean |
| $\bigcirc$ | Project Plan.docx                  | 10 hours ago | Evan R Atkin | 14.5 KB   | 🖞 Only you                   |

Figure 37 – Generate a Guest Link

- 3. The Share window will open. Click Shared With to open additional sharing options (see Figure 38).
- **Note:** Users who are only granted view priviledges will not see who else is on the share.
  - 4. The *Shared With* tab will open and display who the file/folder is currently shared with. Click the **drop-down** for additional options (see Figure 38).
  - 5. The drop-down will display options to change the share to an edit or view share, and an option for stopping the share with the user (see Figure 38).
  - 6. To stop sharing the file/folder with everyone, click **Stop Sharing** (see Figure 38).
  - 7. When finished making your selection, click **Close** (see Figure 38).

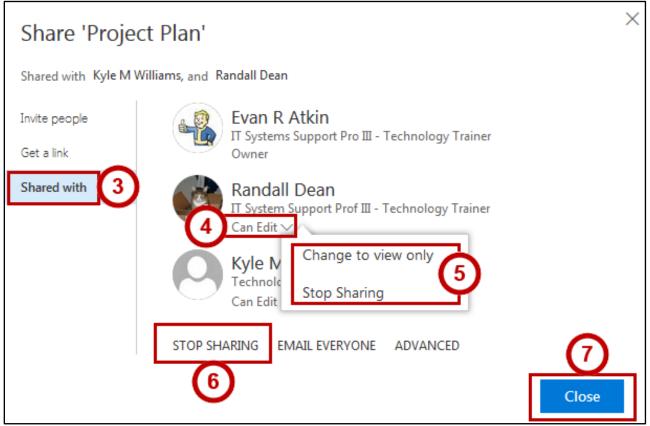


Figure 38 - Shared With Options

### Sharing Files That Have Been Shared With You

In addition to sharing your own files, you can also request that others be allowed access to a file from the original author on files/folders that you have been granted edit permissions on. The following explains how to request someone be granted share permissions:

1. Click Shared with me from the menu to the left.

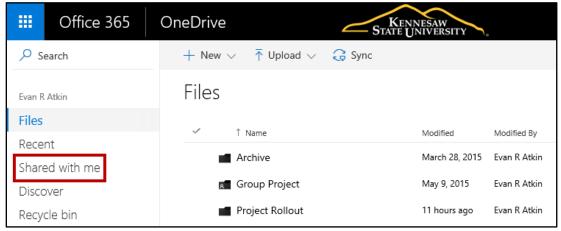


Figure 39 - Access Files Shared with you

- 2. Click to the left of the document(s) you want to alter the permissions on (see Figure 40).
- 3. Click Share (see Figure 40).

| ✓ Search       | 📬 Open 🗸 💪 Share 👁 Get link 🗙 Re          | emove from shared list |
|----------------|---|------------------------|
| Evan R Atkin   | 3<br>Shared with me                       |                        |
| Files          | V News                                    |                        |
| Recent         | Name                                      | ↓ Modified             |
|                | 2 🖉 🔬 Kennesaw State University Owls.docx | 2 days ago             |
| Shared with me |   |                        |
| Discover       | Windows 10 Testing Issues                 | 10 days ago            |

Figure 40 – Sharing a File/Folder Already Shared with You

- 4. The *Share* window will open and will display the *Invite People* tab (see Figure 41).
- 5. Enter the email addresses of the individual(s) you wish to share with (see Figure 41).
- 6. From the drop-down, select the **permissions** to grant (edit or view) (see Figure 41).
- 7. Type a **message** to be sent to the receipients of the share (optional) (see Figure 41).
- 8. Click **Share** to share the document(s) (see Figure 41).

| Share 'Kenn        | esaw State University Owls'                              | ×     |
|--------------------|--|-------|
| Shared with Evan R | Atkin, and Kyle M Williams                               | )     |
| Invite people      | O Michael Pourreau × Can ec                              | lit ▼ |
| Get a link         | 5  |       |
| Shared with        | Randy shared this with me and I think you should see the | his.  |
|                    | Send an email invitation                                 |       |
|                    | 8 Sha  | are   |

Figure 41 – Setting up the Share

**Note:** If you only have view access to the file/folder, your options will be limited to emailing individuals and sending the share. Once sent, the owner of the file/folder will receive a notification asking them to approve the request.

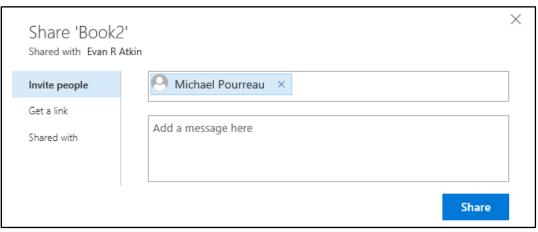


Figure 42 - Sharing a File/Folder with View Only Permission

9. An email will be sent to the file's owner notifying them that a file/folder has been shared with them (for owners, see the section on Managing Pending Access Requests for information on managing requests).

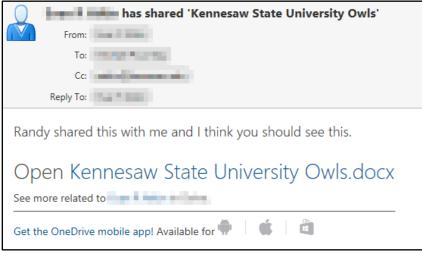


Figure 43 - Notificaion of File/Folder Share

# Manage Shared Access to your Files

To see who a file/folder is shared with, and manage shared access:

- 1. Click to the left of the document(s) you want to mange your shared access for (see Figure 44).
- 2. Click Share (see Figure 44).

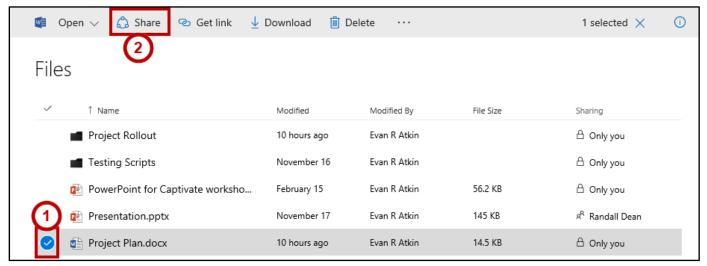


Figure 44 – Sharing Documents

- 3. The *Share* window will open. Click the *Shared with* tab (see Figure 45).
- 4. The *Shared with* tab opens and displays all the users who have received a file share (see Figure 45).
- 5. Under a user, click the **drop-down** to alter view/edit permissions, or remove the user from the share (see Figure 45).
- 6. Click **Stop Sharing** to remove all users from the share at once (see Figure 45).
- 7. Click Email Everyone to send a notification message to all shared users (see Figure 45).
- 8. Click **Close** once finished managing your share (see Figure 45).

| Share 'Project I            | Plan'   | 2     |
|-----------------------------|---|-------|
| Shared with Kyle M Will     | iams, and Randall Dean  |       |
| Invite people<br>Get a link | Evan R Atkin<br>IT Systems Support Pro III - Technology Trainer<br>Owner      |       |
| Shared with                 | Randall Dean<br>IT System Support Prof III - Technology Trainer<br>Can Edit ~ |       |
|                             | Kyle M Williams   |       |
|                             | STOP SHARING EMAIL EVERYONE ADVANCED  | 8     |
|                             |   | Close |

Figure 45 - Shared With Options

**Note:** Your *OneDrive for Business* account will show how many people you are sharing a file with on the *Documents* screen. You can also click the **names** under the *Sharing* column to manage shared access.

| ~        | ↑ Name                           | Modified        | Modified By  | File Size | Sharing                              |
|----------|----------------------------------|-----------------|--------------|-----------|--------------------------------------|
|          | Project Rollout                  | Yesterday at 12 | Evan R Atkin |           | 台 Only you                           |
| -        | Testing Scripts                  | November 16     | Evan R Atkin |           | 🖰 Only you                           |
|          | Office 365 Word Test.docx        | November 15     | Evan R Atkin | 10.7 KB   | <sup>R</sup> Evan Atkin and 1 more   |
|          | PowerPoint for Captivate worksho | February 15     | Evan R Atkin | 56.2 KB   | 🖰 Only you                           |
|          | Presentation.pptx                | November 17     | Evan R Atkin | 145 KB    | <sup>R</sup> Randall Dean            |
| <b>.</b> | Project Plan.docx                | Yesterday at 12 | Evan R Atkin | 14.5 KB   | x <sup>R</sup> Kyle M Williams and 1 |
| <b>.</b> | Tongue Twisters.docx             | November 21     | Evan R Atkin | 10.7 KB   | A Only you                           |

Figure 46 - Number of Shares

#### Managing Pending Access Requests via Email Notification

Other users can share your files with other people. When a user who is not the owner shares your file, you will receive a notification email telling you that the user would like to share the file with someone else.

1. Click the link in the email to be redirected to your Access Requests in Office 365.

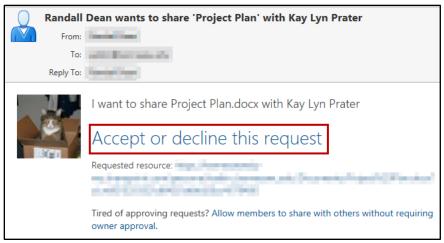


Figure 47 - Request to Share with Another User

- 2. *Office 365* will open and display the *Access Requests* page. All pending access requests will be displayed here with the following information: (see Figure 48)
  - a. The users who are requesting access to the file (see Figure 48).
  - b. Additional options for adjusting the level of permission with the share (see Figure 48).
  - c. The *file/folder* that the request is for (see Figure 48).
  - d. How long ago the request was made (see Figure 48).
  - e. Approve or decline the request (see Figure 48).
- 3. Click the ellipsis to access additional options for the share (see Figure 48).

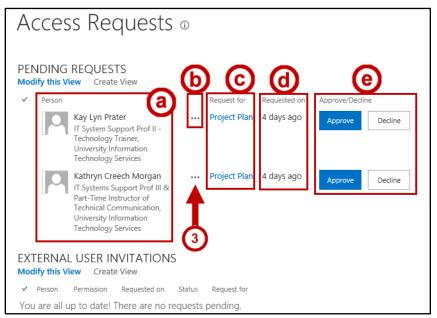


Figure 48 - Access Requests for All Pending Requests

- 4. The Additional options window will open and display more information about the pending request.
  - a. From the drop-down, select a **permission level** (see Figure 49).
  - b. Under the *Conversation* field, enter a message to send to the pending user and click **Send** (see Figure 49).
  - c. Click **Approve** or **Decline** (see Figure 49).

| Kathryn Creech Morgan              | ×  | : |
|------------------------------------|--|---|
| Permission                         | Conversation<br>Please review and let me know your                           |   |
| Requested By<br>Randall Dean       | feedback.  |   |
| Request for<br>Project Plan        | Randall Dean I want to share Project<br>Plan.docx with Kathryn Creech Morgan |   |
| Requested on<br>12/2/2016 12:38 PM | Friday at 4:38 AM  |   |
| Status<br>Pending                  |  |   |
|                                    |  |   |
| APPROVE DECLINE                    |  |   |

Figure 49 - Additional Request Options

**Note:** The following permission levels can be granted:

| Full ControlBy default, this permission level is assigned to the Owners group. It can't be customized or<br>deleted. |  |  |  |  |  |
|--|--|--|--|--|--|
| Design   | Create lists and document libraries, edit pages and apply themes, borders, and style sheets on the site. |  |  |  |  |
| Edit   |  |  |  |  |  |
| Contribute   | View, add, update, and delete list items and documents.  |  |  |  |  |
| Read   | Read Can view pages and items in existing lists and document libraries. Can download documents.          |  |  |  |  |
| Figure 50 - List of Permissions  |  |  |  |  |  |

5. The *Additional Options* window will close and the pending request will be removed from the *Access Request* list.

Alternatively, you can also access your pending share request from within the OneDrive for Business program. To access your pending share request within OneDrive for Business:

1. From within your OneDrive for Business account, click the settings icon.



Figure 51 - Click Settings

2. From the drop-down, click Site Settings.

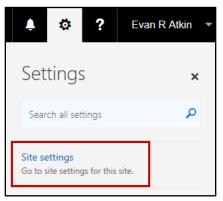


Figure 52 - Access Site Settings

3. The *Site Settings* page will open. Click **Access requests and invitations**.

| Site Settings   |  |
|---|--|
| Users and Permissions<br>People and groups<br>Site permissions<br>Access requests and invitations<br>Site collection administrators<br>Site app permissions | Look and Feel<br>Title, description, and logo<br>Quick launch<br>Top link bar<br>Navigation Elements |
| Web Designer Galleries<br>Site columns<br>Site content types  | Site Actions<br>Manage site features<br>Reset to site definition                                     |
| Web parts<br>List templates<br>Master pages<br>Solutions<br>Composed looks  | Site Collection Administration<br>Recycle bin<br>Search Result Sources<br>Search Result Types        |

Figure 53 - Access Storage Metrics

4. The Access Requests page will open. See the section on Managing Pending Access Requests for more information.

# Signing Out of OneDrive

The following explains how to log out of your OneDrive for Business account:

1. Click your **name** in the upper-right corner.

|               | Office 365       | OneDrive  | Kennesaw<br>State University | , l                   | . ø | ?                 | Evan R A         | tkin | • |
|---------------|------------------|---|------------------------------|-----------------------|-----|-------------------|------------------|------|---|
| ,⊃ si         | earch            | $+$ New $\checkmark$ $\ ar{\uparrow}$ Upload $\checkmark$ | G Sync                       |                       |     | <b>↓</b> ≓ Sort   | ~ ∎              | i    |   |
| Evan R        | Atkin            | Files   |                              |                       |     |                   |                  |      | ^ |
| Files         |                  | ✓ ↑ Name  | Modified                     | Modified By File Size |     | Sharin            | g                |      |   |
| Rece<br>Share | nt<br>ed with me | Archive   | March 28, 2015               | Evan R Atkin          |     | 台 Or              | ıly you          |      |   |
| Disco         | over             | Group Project   | May 9, 2015                  | Evan R Atkin          |     | я <sup>я</sup> Ку | le M Williams an | d 1  |   |
| Recy          | cle bin          | Project Rollout   | 11 hours ago                 | Evan R Atkin          |     | 台 Or              | nly you          |      |   |

Figure 54 - Click your Name

2. From the dropdown menu that appears, click Sign out.



Figure 55 - Sign Out

3. You are now signed out of your account.

# **Additional Help**

For additional support, please contact the KSU Service Desk:

#### KSU Service Desk for Faculty & Staff

- Phone: 470-578-6999
- Email: <u>service@kennesaw.edu</u>
- Website: <u>http://uits.kennesaw.edu</u>



University Information Technology Services

# SharePoint Online with Office 365

Getting Started

University Information Technology Services

Learning Technologies, Training & Audiovisual Outreach

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# **University Information Technology Services**

SharePoint with Office 365 Getting Started

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# Introduction

SharePoint is a Microsoft tool to create web sites to securely store, organize, share, and access information. Only those with whom you share your site can access the information; however, SharePoint site can be accessed from virtually any device using a web browser.

# **Learning Objectives**

After completing the instructions in this booklet, you will be able to:

- Access a SharePoint Site
- Become familiar with the SharePoint Online Interface
- Upload documents to a SharePoint site
- Create and open documents in a SharePoint Online site
- Sync a document library to your computer
- Share a document via link
- Sign out of SharePoint Online

# Accessing a SharePoint Site

You can access a SharePoint site from within Office 365 throught the SharePoint app:

1. From the Office 365 home page, click the **SharePoint** app.

| <br>Office 36 | 55                     |              | STAT     | ENNESAW<br>TE UNIVERSITY |                  |          |
|---------------|------------------------|--------------|----------|--------------------------|------------------|----------|
| Good r        | morning,               | Evan         |          |                          |                  |          |
| N Since Note  | N P:<br>Class Notebook | Sway         | Word     | P                        | Excel            | OneDrive |
| V 🖸<br>Video  | SharePoint             | D H<br>Delve | Newsfeed | <b>Y</b><br>Yammer       | <b>PowerApps</b> | Flow     |
|               | +                      |              |          |                          |                  |          |

Figure 1 - Access the SharePoint App

2. The SharePoint app will open and display available sites to you. Click the **site** set-up for you by your administrator for your group.

|                  | Office 365  | SharePo |   | Kennesaw<br>Te University                       |
|------------------|-------------|---------|---|---|
| <mark>∕</mark> s | earch       |         |   |   |
| Re<br>LT/        | ecent<br>AO | ☆       | Frequent  | ₩S<br>Working Site                              |
|                  |             |         | You modified <b>Document</b><br>on 1/12/2017<br>You modified <b>Sync Test</b><br>on 1/13/2017 | Kay Lyn Prater modified<br>Document on 1/4/2017 |

Figure 2 - Access your SharePoint Site

3. Your SharePoint site will open.

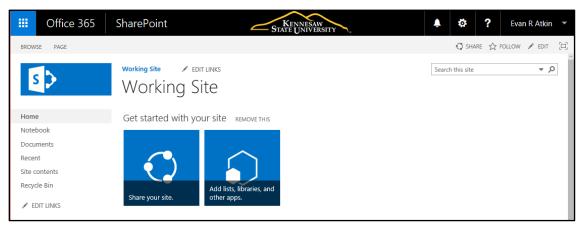


Figure 3 - SharePoint Site

#### **The Interface**

This booklet includes an introduction to the Microsoft SharePoint interface and covers the various aspects of creating and managing content in SharePoint. The following sections will describe the SharePoint interface in Office 365:

- 1. **Quick Launch:** displays links to pages, libraries, and other various content on your site (See Figure 4).
- 2. **Top Link Bar**: contains links to your site home page and other sites and subsites as configured by your administrator (See Figure 4).
- 3. **Personal Menu**: access your personalize page feature for various site content, display the shared view, and sign out of SharePoint (See Figure 4).

| iii Office 365  | SharePoint State UNIVERSITY  | Y _ Kay Lyn Prater   |
|---|--|--|
| BROWSE PAGE   | Home Working Site Team Site - Kay Kathy's Test Space 🖌 ED                        | Kay Lyn Prater<br>kprater@kennesaw.edu                                   |
| S P   | LTAO   | About me   |
| Home  | Get started with your site REMOVE THIS   | View account   |
| Notebook  | Get started with your site Removernis  | Sign out   |
| Documents<br>Recent<br>Site contents<br>Recycle Bin<br>Z EDIT LINKS | Share your site.   | What's your style?     Your site. Your brand.     Keep email in context. |
|   | Newsfeed   | Documents  |
|   | Start a conversation   | 🕀 New 🏦 Upload 💋 Sync 🕠 Share More 🗸                                     |
|   | It's pretty quiet here. Invite more people to the site, or start a conversation. | Find a file<br>✓ □ Name<br>∰ Document ¥ ····                             |
|   |  | Drag files here to upload  |

Figure 4 - SharePoint Interface

# Working with Documents

Documents in SharePoint are stored in Document Libraries. Document Libraries are listed in the *Quick Launch* bar on the left-hand side of the site window. Clicking on a Document Library displays the list of documents stored in that library. In addition to the name of the document, other information about the document, such as the author and the created date, is displayed.

| Office 365    | SKENNESAW<br>STATE UNIVERSITY          |                      |                          | Ļ | ¢ | ?        | Kay Lyn         | Prater  |   |
|---------------|--|----------------------|--------------------------|---|---|----------|-----------------|---------|---|
| ♀ Search      | Working Site                           |                      |                          |   |   | ★ Fol    | lowing 6        | 🖒 Share |   |
| Home          | Working Site<br>WS                     |                      |                          |   |   |          |                 |         |   |
| Notebook      | + New ∨ 〒 Upload 🖉 Quick edit 🤤 Sync … |                      |                          |   | Ξ | = All Do | ocuments $\lor$ | × (i)   |   |
| Documents     |  |                      |                          |   |   |          |                 |         | - |
| Site Pages    | Documents                              |                      |                          |   |   |          |                 |         |   |
| Pages         |  |                      |                          |   |   |          |                 |         |   |
| Site contents | ✓ 🗅 Name ∨                             | Modified 🗸           | Modified By $\checkmark$ | + |   |          |                 |         |   |
| Recycle bin   | Bookmarks.docx                         | Tuesday at 5:45 PM   | Kay Lyn Prater           |   |   |          |                 |         |   |
| C Edit        | CaptivateSettings.docx                 | Tuesday at 5:45 PM   | Kay Lyn Prater           |   |   |          |                 |         |   |
|               | Charts and Graphs.xlsx                 | Yesterday at 6:23 PM | Kay Lyn Prater           |   |   |          |                 |         |   |
|               | a) Document.docx                       | Yesterday at 3:18 PM | Kay Lyn Prater           |   |   |          |                 |         |   |

Figure 5 - Document Libraries

#### **Uploading Documents to a SharePoint Document Library**

The easiest way to upload files to simply drag the file into your document library file list. The file will automatically be uploaded to your library. To upload using the drop and drag method, use the following steps:

- 1. In the *Quick Launch* panel, click the **Document library** where you want the document to be stored (See Figure 6).
- 2. From the location on your computer where the file is located, click and drag the **file(s)** you want to upload onto the document library (See Figure 6).

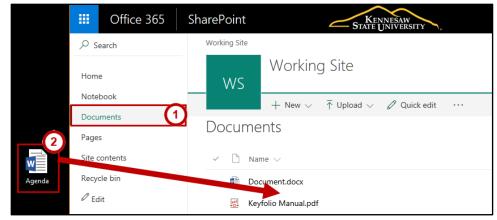


Figure 6 - Click and Drag

3. The file is now uploaded to the document library.

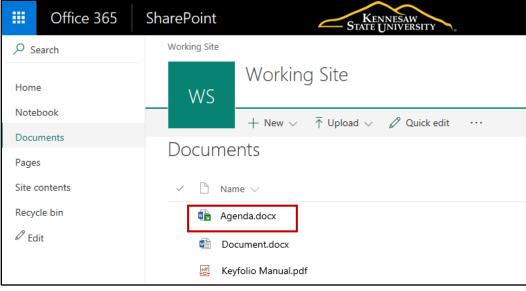


Figure 7 - Document Uploaded

#### **Creating a New Document in a SharePoint Document Library**

SharePoint is integrated with Microsoft Word, Excel, PowerPoint, and OneNote. As such, SharePoint uses these online apps to create new documents. The document will open in the version of *Office Online* that is suitable to the file (e.g. Word documents will open in *Word Online, etc*). Once created in the online app, if you have Microsoft Office installed on your computer, then you may open with the corresponding Office program.

To create a new document:

1. In the *Quick Launch* panel, select the name of the **Document Library** in which you want to store the new document.

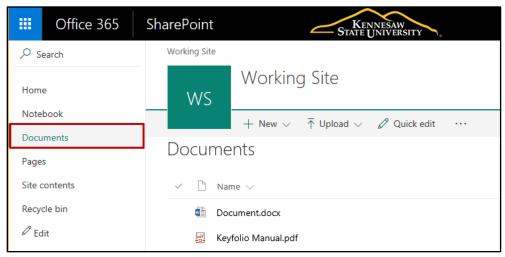


Figure 8 - Access Document Library

- 2. On the *menu bar*, click **New** (See Figure 9).
- 3. A list will appear displaying options to create a new folder, web link, or various types of Office documents. For example, click **Word document**. (See Figure 9).

| P Search      | Working Site   |                      | * Followin           | g 🙆 Share |
|---------------|--|----------------------|----------------------|-----------|
| Home          | Working Site   |                      |                      |           |
| Notebook      | + New ○ ↑ Upload ⊘ Quick edit @ Sync ····  |                      | I All Docume         | ents 🗸 🛈  |
| Documents     | and the second s |                      |                      |           |
| Pages         | Docume   |                      |                      |           |
| Site contents | Word document 3  |                      |                      |           |
| Recycle bin   | V D Nam C Excel workbook   | Modified $\lor$      | Modified By $\sim$ + |           |
| Ø Edit        | <ul> <li>Book DeverPoint presentation</li> </ul>   | Vesterday at 5x5 PM  | Kay Get Prater       |           |
|               | Capti C OneNote notebook   | Yesterday at \$45 PM | Kay Lyn Prater       |           |
|               | e) Osar 🕀 Unk  | Vesterday at S45 PM  | Kay Lyn Ptater       |           |
|               | d) GRANTS SOP.docx   | Yesterday at 5:45 PM | Kay Lyn Prater       |           |
|               | 🗮 Keyfolio Manual.pdf  | Vesterday at 5:45 PM | Kay Lyn Prater       |           |
|               | a notes_08_24_16.docx  | · 15 minutes ago     | Kay Lyn Prater       |           |

Figure 9 - Create New Document

4. *Word Online* will open with a blank document ready for you to edit.

|        | Word Online | Working Site   | Document1 - Sa              | ved  | 🖧 Share               | Rep ( pr. Prates |
|--------|-------------|--|-----------------------------|--|-----------------------|------------------|
| FILE   | HOME INSERT | PAGE LAYOUT REVIEW VIEW Q  | Tell me what you want to do | DIT IN WORD  |                       |                  |
| ۍ<br>د | Paste       | Calibri (Body) • 11 • A <sup>*</sup> A <sup>*</sup> ♦<br>B I <u>U</u> abc x <sub>2</sub> x <sup>2</sup> a <sup>t</sup> / <sub>2</sub> • <u>A</u> • |                             | BbCc AaBbCc AaBbC AaBbCc AaBbCc AaBbCc Heading 1 Heading 2 Heading 3 | Find<br>ab<br>Replace |                  |
| Undo   | Clipboard   | Font   | Paragraph 🕞                 | Styles   | Editing               | ^                |

Figure 10 - New Document Created in Word Online

5. To change the document name from within *Word Online*, simply click the **document name**.



Figure 11- Click the Document Name

- 6. Enter the **new document name** (See Figure 12).
- 7. When you have completed your edits and want to return to the document library, click the **site name** next to *Word Online* (See Figure 12).

|        | Word Online                       | Working Site 7              | My New Document -           | Saved 6  | 🔩 Share   | Kay Lyn Prater |
|--------|-----------------------------------|-----------------------------|-----------------------------|--|-----------|----------------|
| FILE   | HOME INSERT                       | PAGE LAYOUT REVIEW VIEW $Q$ | Tell me what you want to do | DIT IN WORD  |           |                |
| ۍ<br>د | Paste Cut<br>Poste Format Painter |                             |                             | BbCc AaBbCc AaBbC AaBbCc AaBbCc AaBbCc Heading 1 Heading 2 Heading 3 | Find      |                |
| Undo   | Clipboard                         | Font                        | Paragraph 🕞                 | Styles   | 🖫 Editing | ^              |

Figure 12 - Change the Document Name and Return to the Document Library

8. Your new document now appears in the selected SharePoint document library.

| WS    | Working          | y Site   |              |        |                      |                          |                 |     |   |
|-------|------------------|----------|--------------|--------|----------------------|--------------------------|-----------------|-----|---|
|       | $+$ New $\vee$   | ↑ Upload | 🖉 Quick edit | G Sync |                      | ≕ All D                  | ocuments $\lor$ | (i) |   |
|       |                  |          |              |        |                      |                          |                 |     | • |
|       | me 🗸             |          |              |        | Modified 🗸           | Modified By $\checkmark$ | +               |     |   |
| d GR  | ANTS SOP.docx    |          |              |        | Yesterday at 5:45 PM | Kay Lyn Prater           |                 |     | _ |
| 🙇 Key | folio Manual.pdf |          |              |        | Yesterday at 5:45 PM | Kay Lyn Prater           |                 |     |   |
| d My  | New Document.d   | осх      |              |        | * About a minute ago | Kay Lyn Prater           |                 |     |   |
| a not | es_08_24_16.docx |          |              |        | 2 hours ago          | Kay Lyn Prater           |                 |     | - |

Figure 13 - Your New Document

#### **Opening Documents in a SharePoint Document Library**

SharePoint Document Libraries allow you to access your *Microsoft Office* files and edit them online with the *Microsoft Office Online* set of tools, or open the file in the desktop vesion of Microsoft Office.

The following example will demonstrate how to open a Word document in Word Online, then continue editing the document in the desktop version of Word:

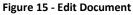
1. Click the **document name** in the Document Library list.

| Working Site                           | ★ Following 🖒 Share   |
|--|---|
| Working Site                           |   |
| + New ∨ 〒 Upload 🖉 Quick edit 🔓 Sync … | ${ m (9)}$ 1 item wasn't deleted ${ m =}$ All Documents ${ m \lor}$ (1) |
| Documents                              | ▲<br>Modified ∨ Modified By ∨ +   |
| GRANTS SOP.docx                        | Yesterday at 5:45 PM Kay Lyn Prater                                     |
| 🧱 Keyfolio Manual.pdf                  | Yesterday at 5:45 PM Kay Lyn Prater                                     |
| My New Document.docx                   | * 9 minutes ago Kay Lyn Prater  |
| notes_08_24_16.docx                    | 2 hours ago Kay Lyn Prater  |

Figure 14 - Click the Document Name

2. The document will open in the version of *Office Online* that is suitable to the file (e.g. Word documents will open in *Word Online, etc*). You can preview the document, or choose to edit the document within your browser. Click **Edit Document**.

|        | Word Online |  | Rep ( professor |
|--------|-------------|--|-----------------|
| Workin | g Site      | My New Document 🕞 Accessibility Mode 🖌 Edit Document - | t 🛃 Share 🚥     |
|        |             |  |                 |



- 3. A drop down menu will appear with the following:
  - a. **Edit in Word**: If you have Microsoft Office installed on your computer, then the file will open with the corresponding Office program (See Figure 16).
  - b. **Edit in Browser**: You can select to edit the document in *Word Online*, or open the document in your desktop version of *Microsoft Word* (See Figure 16).

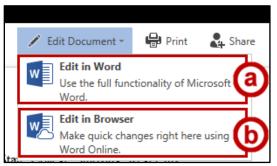


Figure 16 - Edit in Word or in Browser

4. When you have completed your edits and want to return to your document library, click the *SharePoint* **site name** next to *Word Online*.

|        | Word Online  | Working Site                | My New Document - Saved  | 🖧 Share                  |
|--------|--|-----------------------------|--|--------------------------|
| FILE   | HOME INSERT  | PAGE LAYOUT REVIEW VIEW     | Tell me what you want to do EDIT IN WORD   | It's just you here now - |
| ۍ<br>م | Paste K Cut<br>Mathematical Copy<br>Mathematical Copy | Calibri (Body) • 11 • A A & | Image: Image | AaBbCc<br>Heading 3      |
| Undo   | Clipboard  | Font                        | Paragraph 🕞 Styles   | 🕞 Editing 🔨              |

Figure 17 - Click the Site Name

- 5. You will be returned to your document library.
- 6. You can also open a document in the library by:
  - a. Clicking the space to the **left** of the document to select it (See Figure 18).
  - b. Clicking **Open** to reveal a drop-down with more options (See Figure 18).

| Working Sit  | e                          |                     |              | ,                                     | ★ Following | 🎝 Share |
|--|----------------------------|---------------------|--------------|---------------------------------------|-------------|---------|
|  | Working Site               |                     |              |                                       |             |         |
| WS   |                            |                     |              |                                       |             |         |
|  | 🚺 Open 🗸 🖧 Share 👁 Get     | a link 🛛 🛓 Download |              |                                       | 1 selected  | × (i)   |
| \[         \]     \[ | Name 🕎 Open in Word Online |                     | Modified     | $\checkmark$ Modified By $\checkmark$ | +           | <b></b> |
|  | Book 🗐 Open in Word        |                     | Yesterday at | t 5:45 PM Kay Lyn Prater              |             |         |
| <b>a a</b>   | CaptivateSettings.docx     |                     | Yesterday at | t 5:45 PM Kay Lyn Prater              |             |         |
| X  | Charts and Graphs.xlsx     |                     | Yesterday at | t 5:45 PM Kay Lyn Prater              |             |         |
| W  | Document.docx              |                     | 3 hours ago  | Kay Lyn Prater                        |             |         |

Figure 18 - Open a Document

7. When selecting *Open in Word* as in this example, a window will appear asking if you want to open the file. Click **Yes**.

| Microsoft | Office  | × |
|-----------|---|---|
| <b></b>   | Some files contain viruses that can be harmful to your computer. It is<br>important to be certain that this file is from a trustworthy source.<br>Do you want to open this file?<br>Program: Microsoft Word<br>Address: |   |
|           | Yes No  |   |

Figure 19 - Open Filde

8. The document will open in your desktop version of Microsoft Office.

#### Syncing a Document Library to your Computer

You can sync a document library from SharePoint to your computer. Not only will this make working on documents easier, but it will also help to keep the document library updated when you save your work and will make it easier to share documents with other members who have access to the SharePoint Online site.

In order to use the sync feature, you will need the latest version of the OneDrive Sync Client installed on your computer. If on a PC, you can see if the sync client is installed on your computer by looking for the OneDrive icon in your Taskbar in the lower right corner of your screen.



Figure 20 - OneDrive Sync Client Installed

If the OneDrive Sync client is not installed on your machine, or if you have a Mac, please contact the *KSU Service desk* for assistance.

To sync a document library to your computer:

1. After accessing the SharePoint app from the Office 365 portal, click the **SharePoint** site that contains the document library you wish to sync.

| III Office 365 | SharePc | bint St.  | Kennesaw<br>Ate University                      |
|----------------|---------|---|---|
| Search         |         |   |   |
| Recent<br>LTAO | *       | Frequent  | WS<br>Working Site                              |
|                |         | You modified <b>Document</b><br>on 1/12/2017<br>You modified <b>Sync Test</b><br>on 1/13/2017 | Kay Lyn Prater modified<br>Document on 1/4/2017 |

Figure 21 - Access SharePoint Site

- 2. The selected SharePoint site will open. From the *Quick Launch* bar, click the **document library** you wish to sync (See Figure 22).
- 3. The document library will open. On the Menu bar, click Sync (See Figure 22).

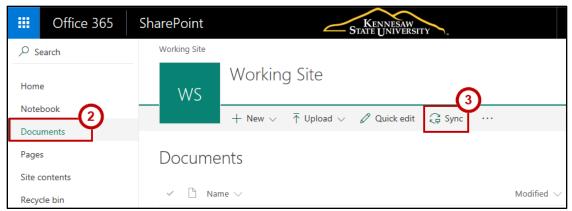


Figure 22 - Sync

4. A confirmation window will appear. Click **Sync now** to begin syncing the document library to your computer.

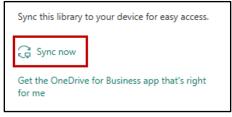


Figure 23 - Sync Now

5. You will be asked to confirm the location on your computer where the files will be stored. Click **Sync Now**.

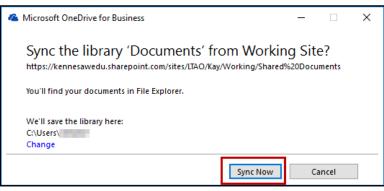


Figure 24 - Sync Now

6. The files from your selected SharePoint site will begin to sync to your computer. As the files are downloaded to your computer, you can access the folder by clicking **Show my files.** 

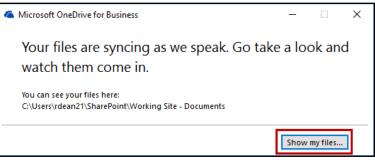


Figure 25 -Show my Files

 The file explorer will open and show a new *SharePoint* link under your quick access links. Clicking on the **SharePoint** icon will show the SharePoint Site – *Documents* that you chose to sync to the computer.

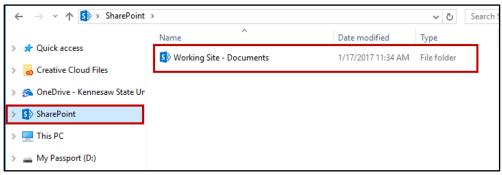


Figure 26 - Accessing SharePoint Site from File Explorer

8. After clicking the *Documents* link, the documents folder will open to display all files/folders on the synced SharePoint site.

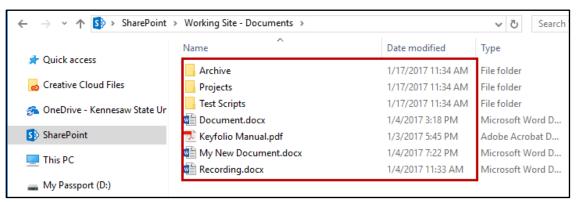


Figure 27 - Synced Documents

# Sharing a SharePoint Link via Email

You can send a link to a SharePoint file via email if you would like a collegue to access the file without having to download a file. To get the link to include in your email:

- 1. After accessing the document library in your SharePoint site, click **next to the file** you wish to share (See Figure 28).
- 2. Click Get a Link (See Figure 28).

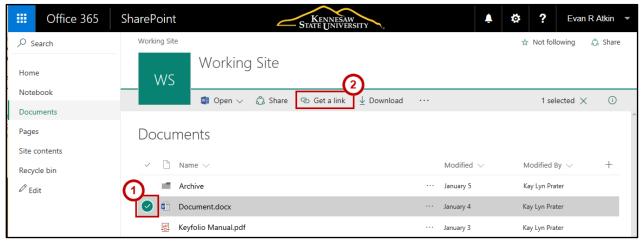


Figure 28 - Generating Links

- 3. The *Share 'Document'* window will open with a *Restricted Link* created by default. Copy the **link** in the field below *Restricted Link* (See Figure 29).
- 4. Once you have copied the link, click **Close** (See Figure 29).



Figure 29 - Copy Share Link

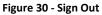
5. You can now paste the link in an email to a colleague.

**Note:** The recipient will need to have permission to access the SharePoint site that the document is originally from.

# Signing out of SharePoint

- 1. Click the drop-down arrow in the *Personal* menu at the top right of the screen (See Figure 30).
- 2. From the drop-down menu, click Sign Out (See Figure 30).

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| Home           | Get started with your site REMOVE THIS                   | View account                      |
| Documents      |  | Sign out                          |
|                | Finne 20, Gine Out                                       |                                   |



# **Additional Help**

For additional support, please contact the KSU Service Desk:

#### KSU Service Desk for Faculty & Staff

- Phone: 470-578-6999
- Email: <u>service@kennesaw.edu</u>
- Website: <u>http://uits.kennesaw.edu</u>