

ONEDRIVE AND SHAREPOINT



Contents

1. Introduction	2
2. Course Overview & Requirements	2
3. Understanding OneDrive	2
4. Using OneDrive.....	4
5. Collaboration in OneDrive	11
6. Understanding SharePoint.....	12
7. Using SharePoint	13
8. Document Libraries	15
9. Add a Shortcut to a SharePoint Site:	19
10. Exercises	22

1. Introduction

This manual provides an in-depth guide to using Microsoft OneDrive and SharePoint for cloud storage, collaboration, and document management. The objective is to help users efficiently store, share, and collaborate on files using these Microsoft 365 tools.

2. Course Overview & Requirements

- Training Schedule: 09:00 – 15:15 (with breaks at 10:20 and 14:20, lunch at 12:00)
- Required: Access to Microsoft 365, a laptop/PC with internet connectivity.

3. Understanding OneDrive

OneDrive is Microsoft's personal cloud storage service. It allows users to securely store and access files from multiple devices.

Key Features of OneDrive

- Cloud-based personal storage
- Accessible on multiple devices
- Secure file backup
- Real-time collaboration

When to Use OneDrive

- Storing personal work files
- Backing up important documents
- Accessing files from different devices
- Working on draft documents before sharing with a team

How OneDrive Fits Within Office 365



Integration:

Works natively with Office apps like Word, Excel, and PowerPoint

Enables real-time co-authoring and editing of documents



Collaboration:

Share files and folders directly from Office apps



Accessibility:

Access files from any device with an Internet connection

Offline access to files through synchronisation

4. Using OneDrive

Accessing OneDrive

Accessing OneDrive from Windows Explorer

1. Open Windows Explorer:

- Press Windows + E on your keyboard to launch File Explorer.
- Alternatively, click the **File Explorer** icon on your taskbar or Start menu.

2. Locate OneDrive:

- In the left-hand navigation pane, scroll down until you find **OneDrive**.
- Click on **OneDrive – [Your Organisation Name]** if using a business account, or **OneDrive – Personal** for personal accounts.

3. Sign in (if required):

- If prompted, enter your Microsoft 365 credentials.
- Once signed in, your OneDrive folder will appear in Windows Explorer like a standard folder.

4. Navigating OneDrive Files:

- All files stored in OneDrive will be displayed here.
- You can open, edit, move, delete, and sync files just like any local folder.
- Files with a **blue cloud icon** are online-only, while **green checkmarks** indicate files available offline.

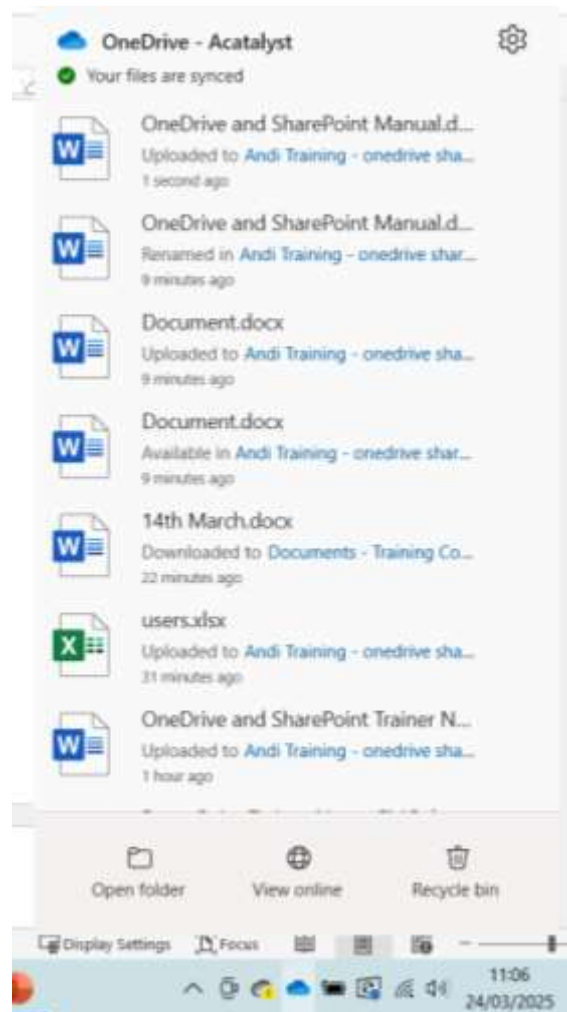
5. Uploading Files to OneDrive:

- Drag and drop files or folders into the OneDrive folder.
- Right-click a file or folder, select **Move to OneDrive**, or copy-paste into the OneDrive folder.

6. Syncing Files:

- Files automatically sync between your computer and the cloud.
- To manually sync, right-click the **OneDrive** icon in the system tray and select **Sync now**.

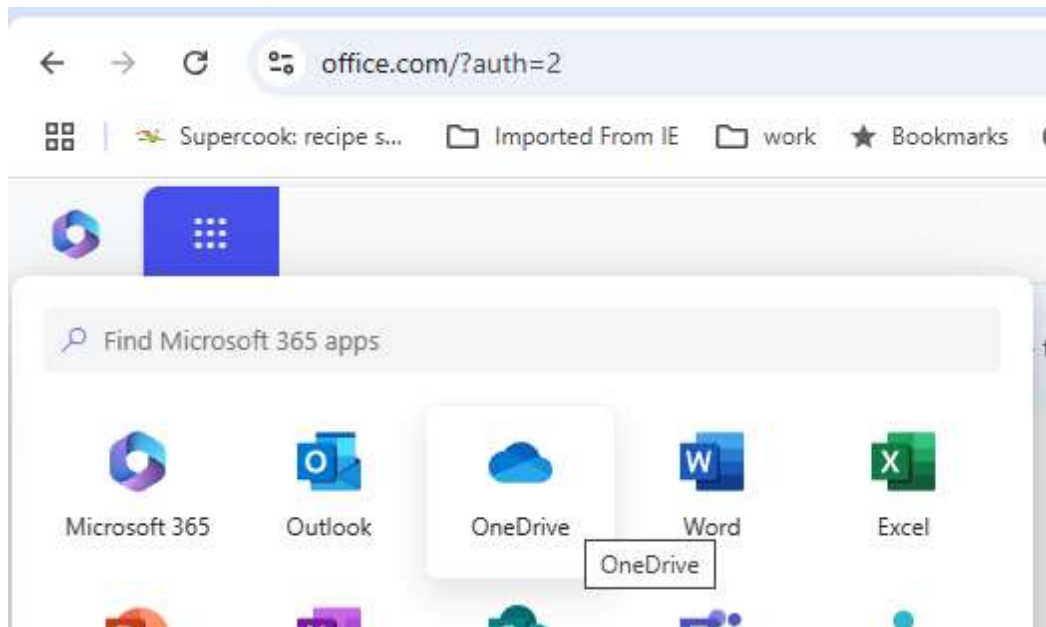
From the Status Bar: Click the cloud icon in the bottom-right system tray.



How to Sign into OneDrive from the Web App

Step 1: Open the OneDrive Website

1. Open a web browser (e.g., Google Chrome, Microsoft Edge, Firefox, Safari).
2. Go to the OneDrive website: <https://onedrive.live.com>.



Step 2: Enter Your Microsoft Account Credentials

1. On the OneDrive homepage, you'll see a **Sign in** button. Click it.
2. Enter your Microsoft account email address (this could be an Outlook, Hotmail, or a business/school email).
3. Click **Next**.

Step 3: Enter Your Password

1. Type in your Microsoft account password.
2. Click **Sign in**.

Step 4: (Optional) Two-Factor Authentication

- If you have **two-factor authentication (2FA)** enabled, you may be asked to verify your identity. Choose one of the following:
 - Enter a code sent to your registered email or phone.
 - Approve the login via the Microsoft Authenticator app.
 - Answer a security question.

Step 5: Access Your OneDrive

1. Once signed in, you will be taken to your OneDrive dashboard.
2. You can now upload, download, organise, and share files.

Troubleshooting Tips

- **Forgot Password?** Click “Forgot password?” on the login page and follow the prompts.
- **Account Issues?** Ensure you are using the correct Microsoft account.
- **Browser Compatibility?** If OneDrive is not loading properly, try clearing your browser cache or using a different browser.

File Behaviour in OneDrive

- Files saved to OneDrive remain in the cloud.
- When opened, they download to the device and sync back when changes are made.
- Deleting files from the local device also deletes them from OneDrive unless restored.

How to Sync and Back Up Files with OneDrive

Option 1: Using the OneDrive Desktop App (Recommended)

The OneDrive desktop app allows you to automatically sync and back up files from your computer to the cloud.

Step 1: Install and Sign into OneDrive

1. **Windows 10/11:** OneDrive is built-in.
 - Click the **OneDrive cloud icon** in the taskbar (bottom-right).
 2. **Mac:** Download it from the **Mac App Store** or [OneDrive's website](#).
 3. Open the OneDrive app.
 4. Sign in with your Microsoft account.
-

Step 2: Set Up Sync for Your Files

1. During setup, OneDrive will ask **which folders you want to sync** (Desktop, Documents, Pictures, etc.).
2. Select the folders you want to back up to OneDrive.
3. Click **Start Backup** or **Next**.

◆ **Everything in selected folders will be continuously synced with OneDrive.**

Step 3: Manually Upload Files to OneDrive (Optional)

If you don't want automatic sync, you can manually back up files:

1. Open **OneDrive** (File Explorer on Windows or Finder on Mac).
 2. Drag and drop files into the **OneDrive folder**.
 3. They will sync to the cloud automatically.
-

Step 4: Check Sync Status

- Look at the **OneDrive icon** in the taskbar:
 -  **Blue cloud** = Synced and up to date.
 -  **Arrows** = Sync in progress.
 -  **Red X** = Sync error (check connection or file size limits).

Option 2: Using OneDrive Web (Manual Backup)

1. Open [OneDrive.com](https://onedrive.com).
 2. Click **Upload** → Select files or folders.
 3. Your files will be backed up to OneDrive.
-

Extra Features for Backup & Sync

◆ Files On-Demand (Save Space on PC)

- Right-click a file in OneDrive → Select "**Free up space**"
- The file stays in the cloud but removes itself from local storage.

◆ Automatic Photo & Video Backup (Mobile)

- Install **OneDrive app** on iPhone/Android.
 - Enable "**Camera Upload**" to back up photos automatically.
-

Troubleshooting Sync Issues

- Restart OneDrive: Right-click the **OneDrive icon** → Click **Restart**.
- Ensure you're signed in with the correct Microsoft account.
- Check storage limits (Free accounts get **5GB**).
- Check your internet connection.

Understanding OneDrive Status Icons

Icon	Meaning
 Blue Cloud Icon	OneDrive is running and online. All files are stored in the cloud but not downloaded to your device until you open them.
 Green Checkmark (Solid)	File is synced and always available offline. This means the file is stored both in OneDrive and on your device.
 Green Checkmark (Outlined)	File is available offline but uses "Files On-Demand". The file was recently opened and temporarily stored on your device but will be removed when storage is needed.
 Blue Syncing Arrows	File or folder is currently syncing. It is being uploaded to or downloaded from OneDrive. Large files or poor internet may slow down syncing.
 Red X Icon	File or folder failed to sync. Possible reasons include connection issues, a file being in use, or a name with special characters.
 Gray Cloud with Line	OneDrive is not running or signed out. Open OneDrive and sign in to start syncing.
 Cloud with Two Circular Arrows	OneDrive is updating. The app is checking for changes and syncing files.
 Person Icon on Folder	Shared folder. This folder is shared with others via OneDrive.
 Padlock Icon	Restricted access. The file is on a managed folder or business account with limited permissions.
 Home Icon (for Work/School accounts)	OneDrive for Business is syncing personal files from your organisation's OneDrive.

How to Fix Sync Issues (Red X or Syncing Forever)

1. **Check Internet Connection** – Make sure you're online.
2. **Restart OneDrive** – Right-click the OneDrive icon > Select **Close OneDrive**, then reopen.
3. **Check Storage** – Free accounts get **5GB** of storage. If full, remove files or upgrade.
4. **Rename Files** – Avoid special characters (*, ?, ", <, >, |).
5. **Manually Sync** – Right-click the file and select **"Sync"**.

5. Collaboration in OneDrive

Sharing Files

- Right-click a file and select **Share**.
- Choose sharing settings (Edit or View Only).
- Share via **email or link**.

Managing Versions

- View previous file versions under **File > Version History**.
- Restore or manage permissions based on access levels.

6. Understanding SharePoint

SharePoint is a collaboration platform that enables teams to manage, store, and share documents.

OneDrive vs. SharePoint

Feature	OneDrive	SharePoint
Purpose	Personal storage	Team collaboration
Best For	Individual files & drafts	Long-term projects & structured content
Sharing	With specific individuals	Organisation-wide access



7. Using SharePoint

To access SharePoint, you typically need a Microsoft 365 (formerly Office 365) account that includes SharePoint, or your organisation may have its own SharePoint setup. Here's a general guide on how to access SharePoint:

Access via Web Browser (Most Common Method):

- **Step 1:** Open your preferred web browser (e.g., Chrome, Edge, Firefox).
- **Step 2:** Go to the SharePoint website URL provided by your organisation. The URL often looks like this:
 - **Microsoft 365 SharePoint:** <https://<companyname>.sharepoint.com>
 - If you don't know your organisation's URL, ask your IT team.
- **Step 3:** Log in with your Microsoft 365 credentials (email and password). If your organisation uses Single Sign-On (SSO), you may automatically be logged in.
- **Step 4:** Once logged in, you'll be taken to the SharePoint homepage or your team site where you can access documents, libraries, and other resources.

Access via SharePoint App:

- **Step 1:** Download and install the SharePoint mobile app from your app store (available for both iOS and Android).
- **Step 2:** Open the app and sign in with your Microsoft 365 credentials.
- **Step 3:** You'll be able to view and manage your SharePoint sites, files, and other content directly from the app.

Access via File Explorer (Windows):

- **Step 1:** If you sync a SharePoint site with OneDrive, you can access files through File Explorer.
- **Step 2:** Open File Explorer and go to the "OneDrive" folder on the left-hand panel.
- **Step 3:** Find your organisation's SharePoint site, and you should see synced files and folders.

Troubleshooting:

- Ensure that you have the necessary permissions to access the SharePoint site or document libraries.
- If you're unable to access it, reach out to your organisation's IT administrator for help.

8. Document Libraries

Working with a **Document Library** in SharePoint is a fundamental task, as it's where you can store, organise, and collaborate on documents and other files. Here's a guide on how to work with a document library in SharePoint:

1. Understanding the Document Library:

A **Document Library** in SharePoint is essentially a collection of files, such as documents, spreadsheets, presentations, and images, which can be shared and managed by your team. You can upload, download, and organise these files to ensure smooth collaboration.

2. Accessing a Document Library:

- **Via Web Browser:**
 - Open SharePoint in your browser.
 - Navigate to the relevant site and select the **Documents** library or any custom document library listed on the site.
- **Via OneDrive (for synced files):**
 - If you sync the document library to OneDrive, you can access it directly from File Explorer on your computer.

3. Uploading Documents:

You can upload files to the document library in multiple ways:

- **Via the Web Interface:**
 1. Open the document library.
 2. Click the **Upload** button at the top.
 3. Select **Files** or **Folder** depending on what you wish to upload.
 4. Browse to the location on your computer, select the files/folder, and hit **Open**.
- **Drag and Drop:**
 - You can drag files from your computer directly into the document library window in SharePoint.
- **Syncing (for easier uploads):**

- If you've synced the library with OneDrive, you can simply drag and drop files into the folder on your computer, and they will be automatically uploaded.

4. Organising Files:

- **Creating Folders:**

1. In the document library, click on **New** at the top and select **Folder**.
2. Give your folder a name and click **Create**.
3. You can move or upload files into these folders to organise your content better.

- **Sorting and Grouping:**

- In the document library, you can sort files by **Name, Modified, Type**, etc.
- You can also group files based on metadata (e.g., categories, tags).

- **Views:**

- You can create different **views** of the document library to display files in various ways (e.g., grid view, list view, etc.).
- To create or customise views, click on the **All Documents** dropdown at the top of the library and choose **Create new view**.

5. Managing Documents:

- **Editing Files:**

- **In Web Interface:** Click on the file name, and SharePoint will open it in the corresponding Office Online application (Word, Excel, PowerPoint, etc.).
- **Check Out/Check In:** If you need to prevent others from editing a document while you're working on it, use the **Check Out** option. When you're done, you can **Check In** the file to save changes and make it available to others.
- **Versioning:** SharePoint keeps a version history of each document. If a file is updated, SharePoint records the version and you can revert to a previous version.

- **Version Control:**

- To view or restore previous versions, right-click on a file, and select **Version History**. This allows you to see the document's versions and restore it to a prior state.
- **Metadata:**
 - SharePoint libraries can use metadata (such as tags, categories, or custom columns) to classify and manage documents. For example, you can create custom columns for **Document Type**, **Project Name**, or **Client Name** to better organise your files.
- **Sharing Files:**
 - Right-click on a file and select **Share**. You can share the file with specific people or groups within your organisation or generate a sharing link.
 - You can also set permissions for who can view or edit the file.

6. Collaborating on Files:

- **Co-authoring:** If multiple people are working on the same document, SharePoint allows real-time co-authoring. You and your team can work on Word, Excel, or PowerPoint documents at the same time without worrying about conflicting edits.
- **Comments:** SharePoint also allows you to leave comments directly on the document (in Office apps), so you can provide feedback or ask questions.

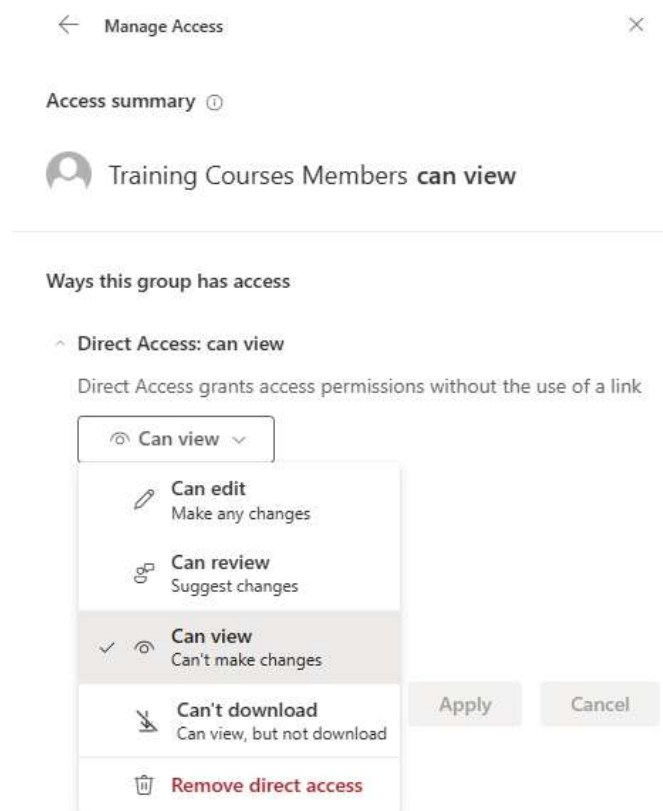
7. Synchronising Files (Offline Access):

If you want to work on files offline, you can **sync** the document library with your desktop using **OneDrive**.

- In the document library, click **Sync** (or "Sync this library" if using OneDrive).
- You'll need to have the OneDrive app installed. Once synced, you can work on files offline, and they will automatically sync when you're back online.

8. Permissions:

SharePoint libraries can be secured with granular permissions:



- You can assign different permissions to specific users or groups for who can view, edit, or delete files in the library.
- To manage permissions, click on the **Settings** gear in the top-right corner, select **Library Settings**, then go to **Permissions for this document library**.

9. Managing Large Document Libraries:

- If your library has a lot of documents (more than 5,000 items), it's important to plan for effective document organisation. You can organise documents into folders, and use metadata or views to filter and sort files efficiently.
- **Content Types:** You can use **Content Types** to manage documents with different attributes, such as contracts or invoices, and ensure they have the right metadata.

9. Add a Shortcut to a SharePoint Site:

If you want a shortcut to a SharePoint **site** (e.g., your team's main SharePoint site), follow these steps:

Using Web Browser (Chrome, Edge, etc.):

1. Navigate to the SharePoint Site:

- Open your web browser (e.g., Chrome, Edge, Firefox) and go to the SharePoint site you want to create a shortcut for.

2. Create the Shortcut:

- **In Chrome or Edge:**

- In Chrome or Edge, click the three vertical dots (menu) in the top-right corner of the browser.
- Select **Cast Save and Share and choose create Shortcut**
- A dialog box will appear, allowing you to give the shortcut a name.
- Check the option to **Open as window** if you want the site to open in a new window without the browser interface (optional).
- Click **Create**.
- This will create a shortcut on your desktop.

3. Using the Shortcut:

- You'll now see a shortcut icon on your desktop that you can double-click to quickly access the SharePoint site.

Using Microsoft Edge (Alternative Method):

1. In **Microsoft Edge**, visit the SharePoint site.
2. Click on the **Settings (three dots)** in the top-right corner.
3. Select **Apps > Install this site as an app**.
4. After installation, the site will appear in your start menu and as a shortcut on your desktop.

2. Add a Shortcut to a SharePoint Document Library:

If you want to add a shortcut to a **specific document library** or folder in SharePoint, follow these steps:

Using OneDrive Sync (Recommended for Document Libraries/Folders):

1. Sync the Document Library to OneDrive:

- Navigate to the **Document Library** in SharePoint that you want a shortcut to.
- Click the **Sync** button at the top of the library (you need the OneDrive app installed for this to work).
- Follow the prompts to sync the library to your desktop.

2. Accessing the Synced Library:

- Once synced, the SharePoint document library will appear in your **OneDrive** folder in **File Explorer** on Windows or in Finder on macOS.
- You can now create a shortcut to that folder directly on your desktop:
 - Right-click the synced folder in **File Explorer** (or Finder).
 - Select **Send to > Desktop (create shortcut)** on Windows or **Make Alias** on macOS.

Creating a Manual Desktop Shortcut (For Direct URL):

If you want to manually create a shortcut to a specific **SharePoint folder** or **document**, here's how to do it:

1. Copy the URL:

- Go to the **document or folder** in SharePoint.
- Copy the **URL** of the page from the browser address bar.

2. Create a Shortcut:

- **On Windows:**
 - Right-click on your desktop and choose **New > Shortcut**.
 - Paste the URL into the "Type the location of the item" box.
 - Click **Next**, name the shortcut, and click **Finish**.
- **On Mac (Finder):**
 - Open **TextEdit** and paste the URL into the document.
 - Save the file with the extension **.webloc** (e.g., SharePointShortcut.webloc).
 - You can now drag this **.webloc** file to your desktop as a shortcut.

3. Additional Tips:

- **Custom Icon:** You can also change the shortcut icon to something more recognisable (e.g., SharePoint logo) by right-clicking the shortcut, selecting **Properties**, and changing the **icon** under the **Shortcut** tab (this may require a .ico file or SharePoint icon).
- **Using Microsoft Teams:** If your SharePoint is connected to Teams, you can access files via the **Files** tab in Teams, and then follow the above steps for creating desktop shortcuts.

Summary:

- **For a SharePoint site**, you can create a shortcut directly from your browser or install it as an app using Edge.
- **For a document library or folder**, sync it using OneDrive and create a desktop shortcut from the synced folder, or manually create a shortcut with the URL.

10. Exercises

Exercise 1: Creating & Saving a File in OneDrive

1. Create a Word document titled **MY DAY**.
2. Write about your breakfast or an ideal breakfast.
3. Save the file in OneDrive.

Exercise 2: Discussing OneDrive Benefits

- In groups, discuss the pros and cons of OneDrive.

Exercise 3: Saving & Favouriting a File

1. Save this PowerPoint presentation to OneDrive.
2. Mark it as a favourite.

Exercise 4: Sharing & Editing a Document

1. Open **MY DAY**.
2. Add details about lunch.
3. Share with Andrea@acatalyst.onmicrosoft.com.

Exercise 5: OneDrive vs. SharePoint

Decide where to store:

- HR Policy document
- To-Do list
- Project Plan

Exercise 6: Uploading a File to SharePoint

1. Navigate to [Training SharePoint Site](#).
2. Upload **MY DAY** to the document library.

Exercise 7: Co-Authoring a Document

1. Open the **Collaboration Document**.
2. Type your name and favourite animal.